

# HR505

## Organizational Management

### **PARTICIPANT HANDBOOK INSTRUCTOR-LED TRAINING**

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# Typographic Conventions

American English is the standard used in this handbook.

The following typographic conventions are also used.

This information is displayed in the instructor's presentation



Demonstration



Procedure



Warning or Caution



Hint



Related or Additional Information



Facilitated Discussion



User interface control

*Example text*

Window title

*Example text*



# Preparing for Your SAP Live Class

## Required Equipment for Your SAP Live Class

- PC or Mac
- Integrated or external web cam
- Headset with integrated mic
- Stable internet connection

You can test if your setup is working correctly by using this link: <https://sap.zoom.us/test>

We recommend that you connect two monitors to your PC so that you can manage the course content more efficiently. This will reduce the need for you to switch (alt+tab) between the applications we use in class.

## Getting the Most Out of Your SAP Live Class

- Make sure you have setup and thoroughly tested the SAP Live Class environment and resolved any issues well before the class begins. Refer to the separate instructions that you were sent for setup instructions and support contact information.
- Keep your web cam activated during the training sessions. You can switch it off during breaks if you prefer.
- Use a headset with an integrated mic to ensure a high-quality audio experience for both you and the other participants. Laptop speakers and mic produce poor quality sound and introduce background noise that can disturb the class.
- Make sure you are in a quiet area where you will not be disturbed.
- Be ready to use the mute feature to ensure any background noise does not disturb the class.
- Turn off email, phones, instant messaging tools, and clear other distractions away from your training area.
- Actively participate and prepare to be called on by name.
- Be patient waiting for a response to your chat messages.
- Always ask the instructor for assistance if you need help with an exercise. Don't get left behind.
- Be ready to begin class on time so you do not delay the start of each session.
- During breaks, make sure you take the opportunity to get out of your chair and stretch.
- Please raise any concerns relating to the SAP Live Class experience with your instructor at the time they arise so that they can be quickly addressed.



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# Course Overview

## **TARGET AUDIENCE**

This course is intended for the following audiences:

- Application Consultant
- Business Process Owner/Team Lead/Power User
- Data Consultant/Manager







# UNIT 1

# Organizational Management Structures

## Lesson 1

Outlining Organizational Management (OM) Basics

3

### UNIT OBJECTIVES

- Outline the setup and interfaces of the OM component
- Outline the integration between OM and other components







# Outlining Organizational Management (OM) Basics

## LESSON OVERVIEW

This lesson introduces the Organizational Management (OM) component and its interfaces and integration capabilities.

### Business Example

As an organizational planner in the HR department of your company, you are responsible for overseeing the implementation of organizational management and the creation and maintenance of the company's organizational plan. For this reason, you require the following knowledge:

- An understanding of the business benefits of OM
- An understanding of the user interfaces used to maintain the company's organizational plan in OM
- An understanding of the integration points of OM with other SAP components



## LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Outline the setup and interfaces of the OM component
- Outline the integration between OM and other components



## Organizational Management (OM)



Figure 1: Organizational Management

### Examples of OM activities include the following:

- Map the functional organizational structure (for example, department hierarchy) and the reporting structure of your enterprise to an organizational plan.
- Analyze the current organizational plan based on the requirements of your organization, and plan workforce requirements and personnel costs accordingly.
- Create additional organizational plans as planning scenarios to simulate new structures in the framework of business process reengineering.
- Guarantee effective workflow management through access to the organizational plan.



## User Interfaces in Organizational Management

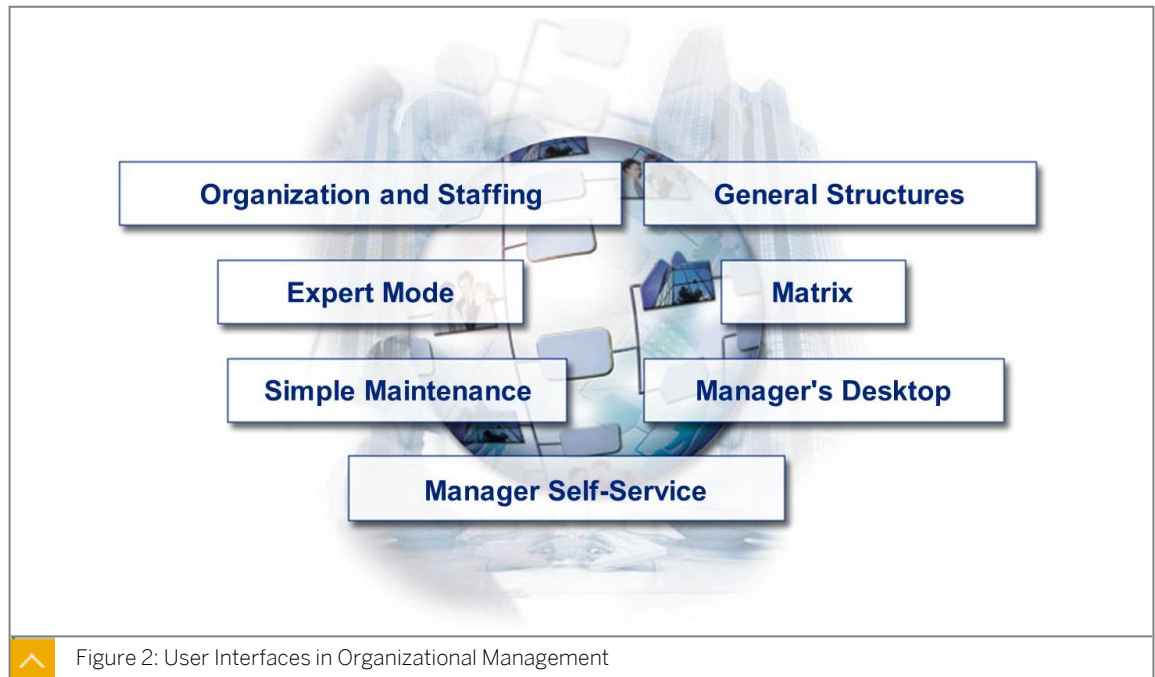


Figure 2: User Interfaces in Organizational Management

### OM includes the following user interfaces for editing structures and maintaining organizational plans:

- *Organization and Staffing*  
The *Organization and Staffing* interface enables you to create and edit organizational plans. It is the ideal tool for maintaining organizational plans on a daily basis.
- *Expert Mode*  
The interfaces in *Expert Mode* allow you to edit the properties of all objects in Organizational Management by using infotypes.
- *Simple Maintenance*  
The *Simple Maintenance* interface is ideal for creating and structuring a new organizational plan quickly.
- *General Structures*  
The *General Structures* interface allows you to edit organizational plans using different structures, including object types that you define yourself (such as teams).
- *Matrix*  
The *Matrix* interface allows you to create and edit matrix structures. It enables you to map responsibilities that overlap in the system.

Manager's Desktop (MDT) provides company managers with an effective reporting and maintenance tool. It facilitates the decentralization of personnel management responsibilities to your line managers. MDT contains cross-component functions from Human Resources (HR) and Financial Accounting (FI).

Manager Self-Service (MSS) is a part of the SAP Enterprise Portal and provides managers with various applications. The part that includes Human Resources contains reports and maintenance functions for managers.



MDT and MSS support managers in their daily administrative and strategic tasks.

### Integration of Organizational Management with Other Components



Figure 3: Integration of Organizational Management with Other Components

OM is an integral part of an SAP system. In some cases, OM must interface with other components to exploit its full capabilities.

The following table illustrates the components of OM:

Component	Description
Personnel Development	Enables you to plan and carry out training and job-related activities that provide professional development for your employees.
Training and Event Management or Enterprise Learning	Enables enterprises to organize and schedule training events and conventions.
Workflow	Automates business processes so that the right task is forwarded to the right person at the right time. This component is also used for approvals.
Enterprise Compensation Management	Includes all the functions required for the administration of compensation, such as carrying out a salary review.
Controlling	Enables you to monitor costs (for example, project costs). When you link cost centers with elements in the organizational plan, this enables direct integration with Controlling (CO).
Capacity Planning	Enables you to schedule persons based on their availability and qualifications to complete work for specific work centers.





Note:

Integration between OM and Personnel Administration (PA) is discussed in the relevant unit of this course.



### LESSON SUMMARY

You should now be able to:

- Outline the setup and interfaces of the OM component
- Outline the integration between OM and other components







## Learning Assessment

1. Which of the following statements about Organizational Management (OM) are true?

*Choose the correct answers.*

- ☐ A OM includes various user interfaces you can use to create and edit different structures.
- ☐ B OM enables you to analyze your current organizational plan, based on your requirements. However, you cannot create further organizational plans as planning scenarios.
- ☐ C OM enables you to map the functional organizational structure (department hierarchy, for example) and the reporting structure of your enterprise as an organizational plan.

2. The Organization and Staffing user interface is best suited for creating large structures.

*Determine whether this statement is true or false.*

- ☐ True
- ☐ False

3. Which of the following components is not integrated with Organizational Management?

*Choose the correct answer.*

- ☐ A Personnel Administration
- ☐ B Workflow Management
- ☐ C Time Management
- ☐ D Personnel Cost Planning
- ☐ E Capacity Planning



## Learning Assessment - Answers

1. Which of the following statements about Organizational Management (OM) are true?

*Choose the correct answers.*

- ☒ A OM includes various user interfaces you can use to create and edit different structures.
- ☐ B OM enables you to analyze your current organizational plan, based on your requirements. However, you cannot create further organizational plans as planning scenarios.
- ☒ C OM enables you to map the functional organizational structure (department hierarchy, for example) and the reporting structure of your enterprise as an organizational plan.

2. The Organization and Staffing user interface is best suited for creating large structures.

*Determine whether this statement is true or false.*

- ☐ True
- ☒ False

3. Which of the following components is not integrated with Organizational Management?

*Choose the correct answer.*

- ☐ A Personnel Administration
- ☐ B Workflow Management
- ☒ C Time Management
- ☐ D Personnel Cost Planning
- ☐ E Capacity Planning



## UNIT 2

# Organizational Management Concepts

### Lesson 1

Outlining Organizational Management Concepts

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### Lesson 2

Finding Object Relationships

23

### Lesson 3

Planning Options in Organizational Management

33

### UNIT OBJECTIVES

- Outline the basic object types in OM
- Find object relationships used to depict the organizational structure
- Confirm the setup of plan versions to enable organizational planning
- List object characteristics to ensure appropriate associations are set up







# Outlining Organizational Management Concepts

## LESSON OVERVIEW

This lesson explains the basic concepts of the Organizational Management (OM) component and introduces you to the object types used in OM.

### Business Example

You need to supervise the creation and maintenance of the company's organizational plan. For this reason, you require the following knowledge:

- An understanding of the concept of OM
- An understanding of the structures used in OM



## LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Outline the basic object types in OM

## Concepts of Organizational Management

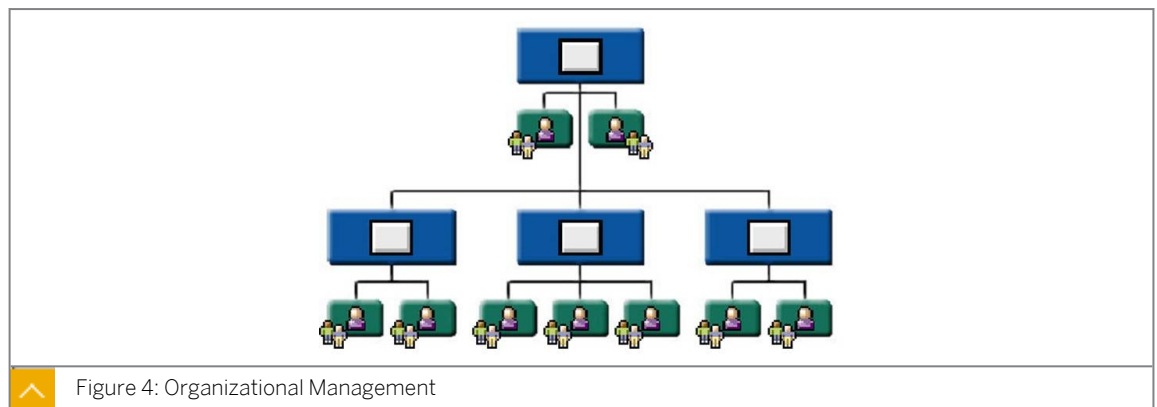


Figure 4: Organizational Management

OM provides a basis for implementing or using other Human Resources components (such as Personnel Development and Compensation Management) and cross-application components (such as Workflow).

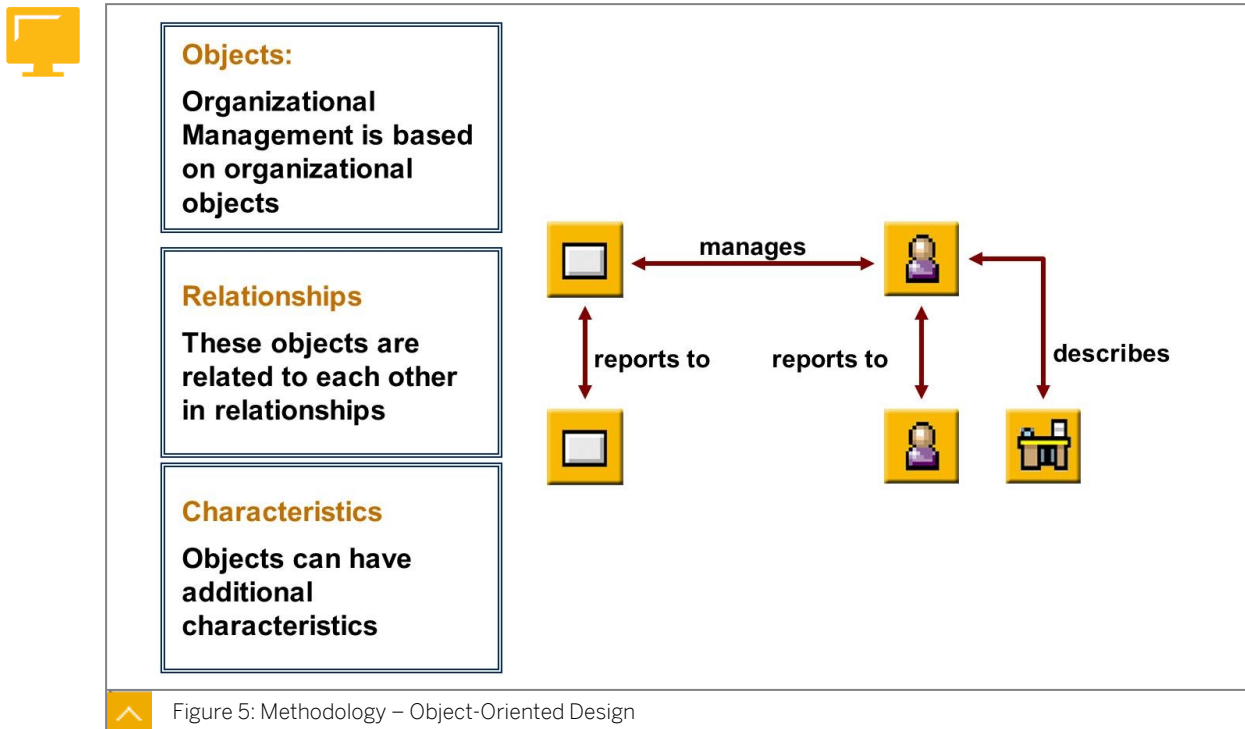
### Using OM, you can achieve the following objectives:

- Create a model of the organizational and reporting structures of your enterprise for a specific period.
- Obtain an overview of the current status of your organizational and reporting structures at any time.



- Valuate and analyze easily.
- Plan and simulate future planning scenarios.

### Object-Oriented Design



OM is based on object-oriented design, that is, each element in an organization represents a standalone object with individual characteristics. These objects are created and maintained individually. They are then linked together by using relationships, such as those indicated in the figure Methodology - Object Oriented Design, to form a network. This network has the flexibility to perform human resources planning, forecasting, and reporting.

You can create additional object characteristics. This provides additional information for other components, evaluations, and so on.

All object characteristics (for example, relationships and description) are maintained in infotypes.



## Object Types



Object Type	Object Type Key	Object Icon
Organizational unit	O	
Job	C	
Position	S	
Cost center	K	
Person	P	

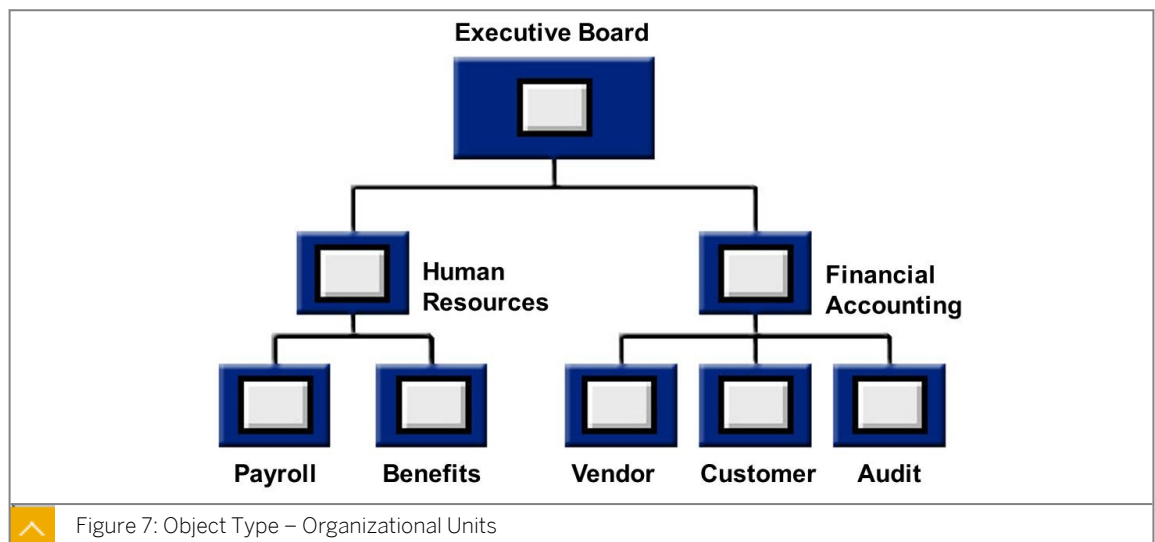
Figure 6: Object Types

An organizational plan consists of many object types. The object types shown in the figure Object Types form the building blocks. Each object type has a key associated with it.

Object types such as tasks and work centers are also important elements of OM.

Persons are the holders of a position. Positions are defined and assigned to organizational units and cost centers.

## Organizational Unit: Object Type Key O



Organizational units represent units of your company that perform specialized tasks or functions. Based on the allocated tasks or functions, these units can be departments, project teams, or groups. A project team is a way to see a different view of your organization in addition to the departmental view.



You can set up the organizational structure of your company by creating relationships between the organizational units. The relationships can be in a hierarchy or a matrix. The organizational structure forms the basis for creating an organizational plan.



**Note:**

An organizational unit is different from an enterprise structure such as a personnel area, company code, or business area. These are used to model structures in Personnel Administration (PA) or Financial Accounting (FI), for example.

### Position: Object Type Key S

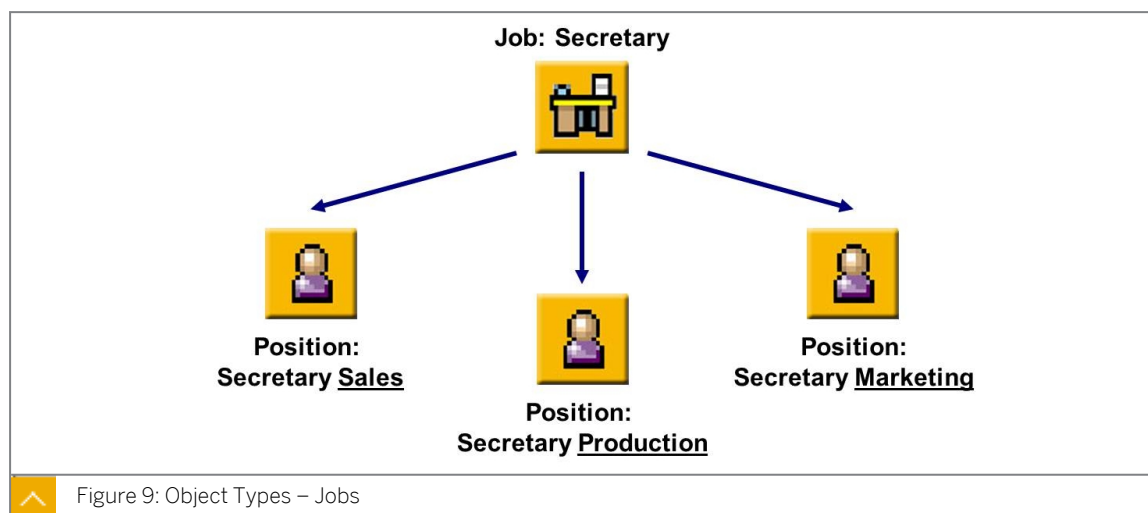


Positions represent concrete and specific job roles that are held by persons within the company. Positions are company-specific.

A position is usually occupied by one person. However, a position can have multiple assignments. For example, two employees can share the workload of a position in a 60:40 ratio.

Positions can be 100% filled, partially filled, or left vacant.

### Job: Object Type Key C



Jobs are general classifications for sets of functions. Positions are created based on jobs. For example, if you create a position (for example, manager of the US Sales Office), you can relate it to the corresponding job (for example, manager) that exists in the job index.



A job describes a position. Through this relationship, the position automatically inherits the tasks, qualifications, and characteristics assigned to the job. This significantly reduces the time required for data entry, because characteristics do not have to be assigned to each position separately. Instead, they are inherited through the descriptive job.

**Jobs are important in the following components:**

- Shift Planning
- Personnel Cost Planning
- Career and Succession Planning
- Compensation Management



**Note:**

When you create jobs, they are listed in the job index. A job index is a list of jobs that are maintained for an enterprise.

**Cost Center: Object Type Key K**

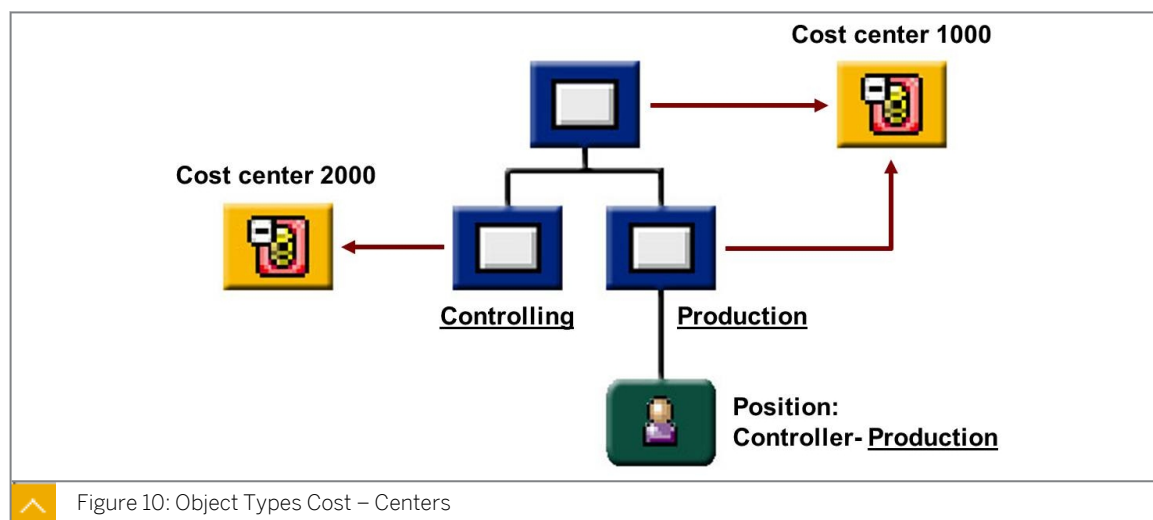


Figure 10: Object Types Cost – Centers

Cost centers are maintained in CO and can be related to either organizational units or positions. The relationship between organizational units and cost centers is hierarchically inherited along with the structure.



### Person: Object Type Key P

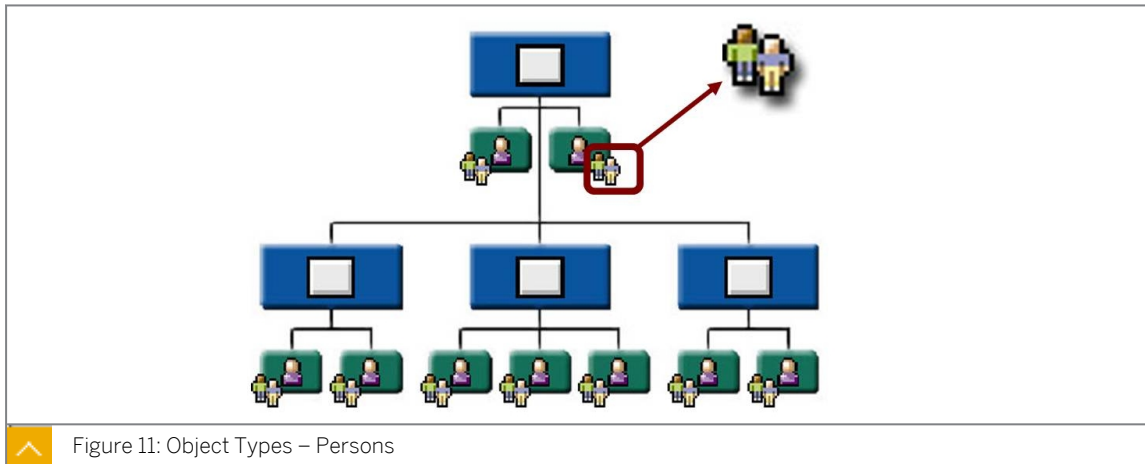


Figure 11: Object Types – Persons

Persons generally represent employees within an organizational unit and hold positions within the organizational structure.

Persons are linked to the organizational plan when positions are assigned to them.

The characteristics of persons such as organizational assignment, planned working time, basic pay, and addresses are maintained as infotypes in PA.

The *Organizational Assignment* infotype in PA contains the position assignment. If integration is active between OM and PA, the *Organizational Assignment* infotype also contains the defining job, organizational unit, and cost center assignment.

### Task: Object Type Key T

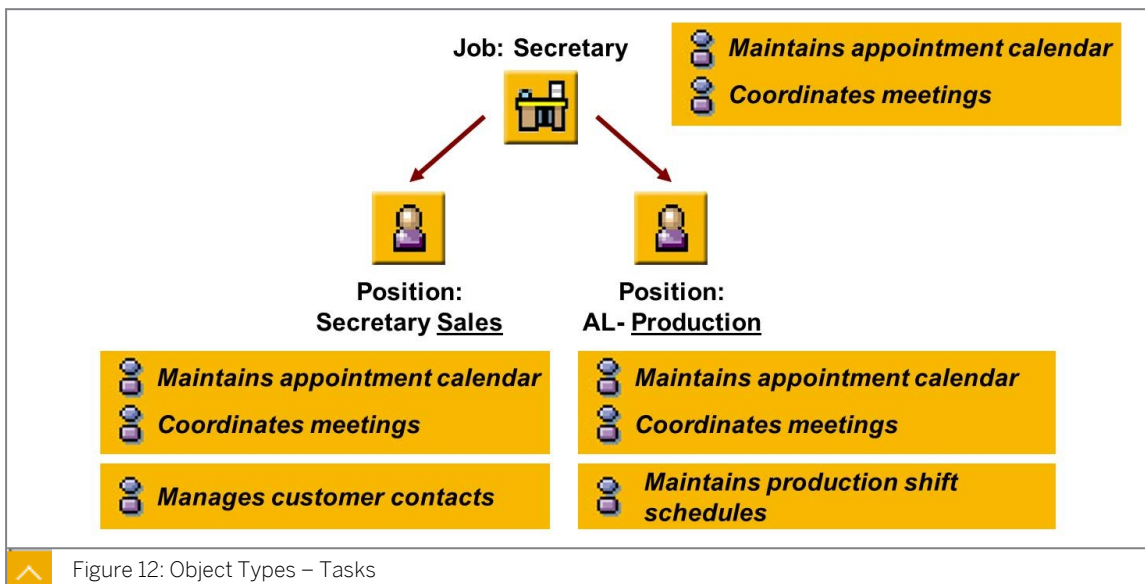


Figure 12: Object Types – Tasks

Tasks describe the responsibilities of organizational units, jobs, positions, persons, and work centers. Examples of tasks include answering the telephone, developing marketing material, and appraising clients.



**Tasks can be classified in the following ways:**

- As part of the workflow for monitoring cross-application processes (new workflows are created with the object type TS, as opposed to the object type T)
- As personnel management tools to describe jobs and positions

For personnel management purposes, tasks are individual duties and responsibilities that must be undertaken by employees.

You can create single tasks or task groups. Single tasks are individual activities, and task groups are activities that are performed together.

All tasks are contained in a task catalog. The catalog also displays the relationships that exist between different tasks, provided that task groups have been defined.

To link tasks to a set of positions, you must first link the task common to all positions to the corresponding job. In this way, when you create a position based on the job, the tasks are automatically transferred to the position.

When you assign the same task to several jobs, you can use different weightings (for example, an administrator can spend 60% of the time on the task filing and an analyst can spend 20% of the time on the same task).

This gives you accurate information when analyzing job descriptions.

**Work Center: Object Type Key A****Examples:**

- **Plant A**
- **Philadelphia Branch Office**
- **Work center C, Room 34**



Figure 13: Object Types – Work Centers

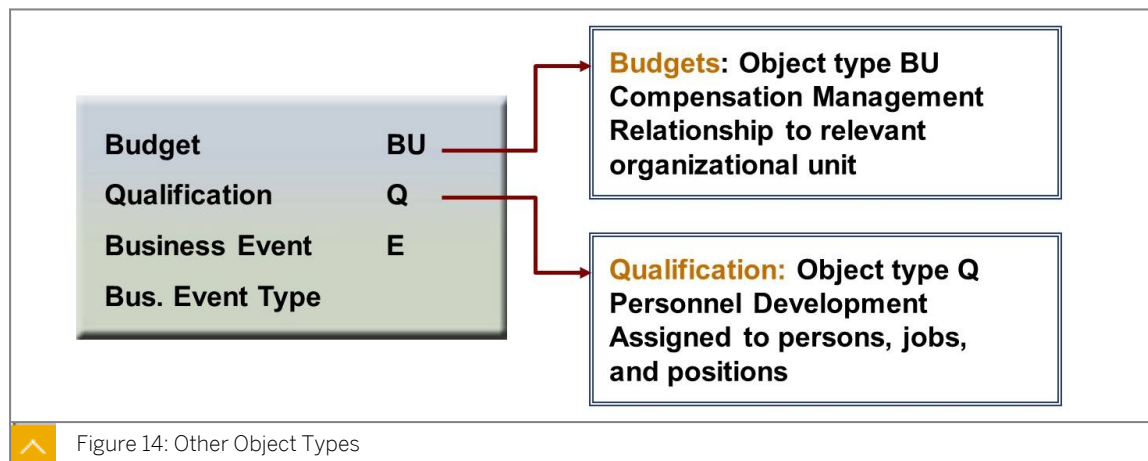
Work centers represent the physical locations where tasks are carried out. A work center can be determined using a general location description (for example, Philadelphia Branch Office). However, the general location description can contain an exact description of the location, such as a specific desk with specific equipment in a particular building. An exact and precise description is useful in a production plant.

Several positions can share one work center. For example, the Reception work center can be assigned to two positions that are held by persons who work different shifts.

After you create work centers, you can describe their attributes. You can define restrictions or specify certain checks that have to be performed at regular intervals.



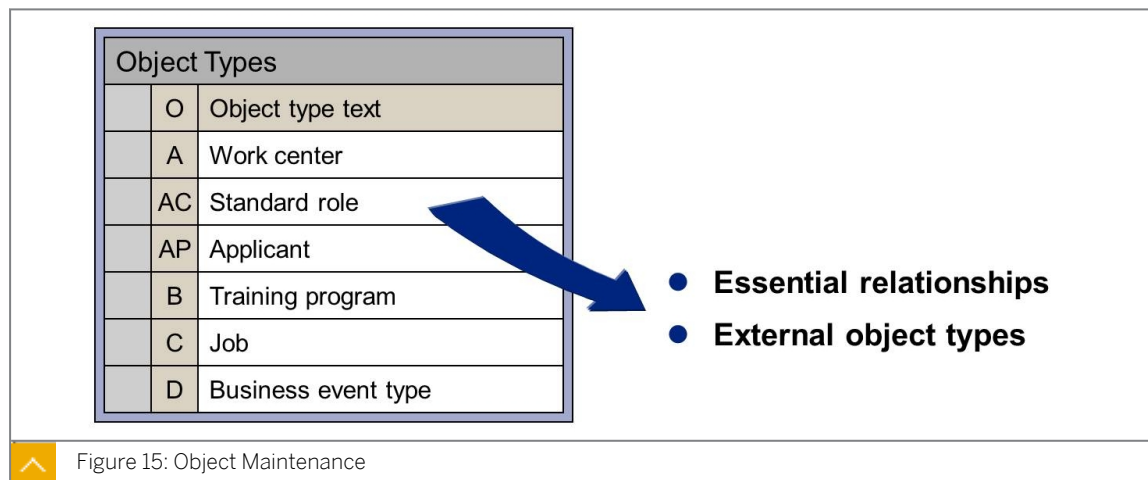
## Other Object Types



Other object types such as qualification or budget can be used in OM to further define the organizational plan.

Some object types are not applicable in OM, even though they are defined in the same tables as the OM objects. For example, object types D, E, and L are similar in nature to OM object types, however, they are applicable to Enterprise Learning.

## Object Maintenance



You can change standard object types or create new ones in OM.

### The following information can be defined:

- Essential relationship:  
You specify the relationship type to be created when you create an object in expert mode.
- External object types:  
You specify the interface program to be used for reading and using external object types.
- Structure search:  
You specify the evaluation path to be used in the structure search help for various object types.



You can create two-digit object types in the customer namespace range of 01–99.



### **LESSON SUMMARY**

You should now be able to:

- Outline the basic object types in OM







## Finding Object Relationships

### LESSON OVERVIEW

This lesson explains object relationships and shows how these relationships can be used to build structures.

### Business Example

You need to supervise the creation and maintenance of your company's organizational plan in the system. For this reason, you require the following knowledge:

- An understanding of the structures of Organizational Management (OM)

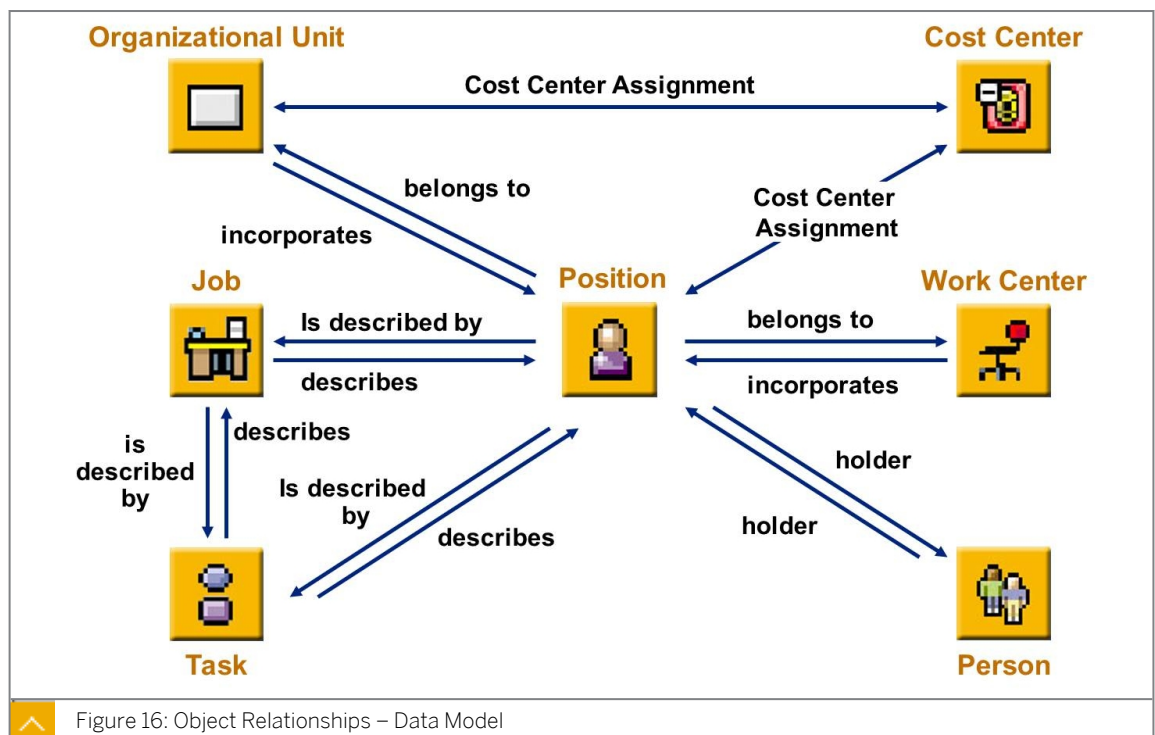


### LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Find object relationships used to depict the organizational structure

### Data Model



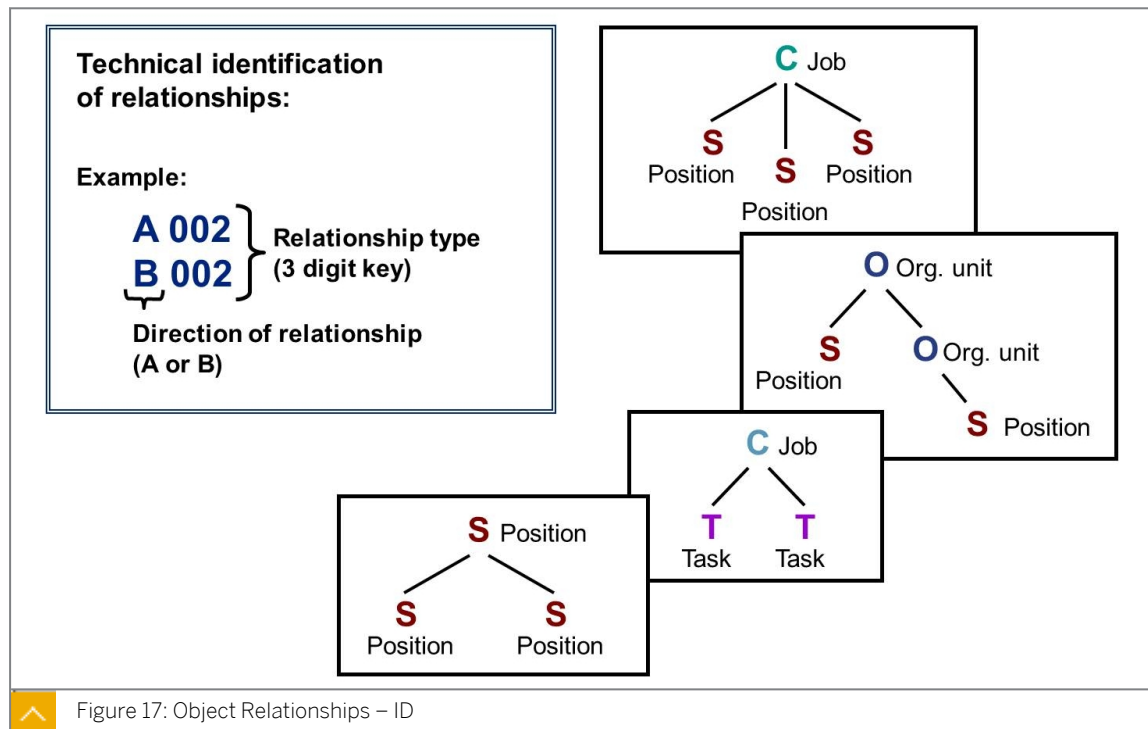
Objects are linked to each other using relationships. You create relationships between the individual elements in your organizational plan. Several linked objects form a structure.

Different types of relationships are used because there are different types of connections between elements. The relationships used between standard object types are predefined in



the SAP standard system. You must be careful if you change a relationship that is delivered with the standard system, because it can impact the evaluation results. You are advised to copy the standard delivered relationship as well as workflows, authorization and security access and create a new relationship when required.

### Relationship ID



Each standard relationship has a 3-digit numeric key.

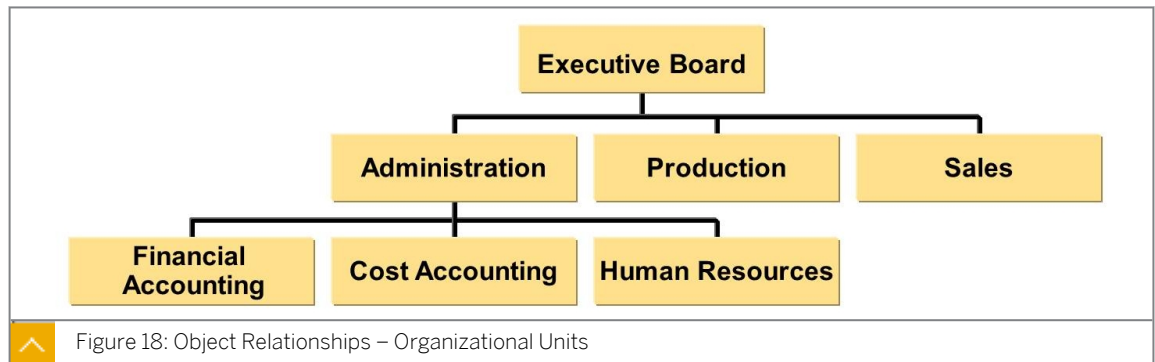
You can define your own relationships. The namespace AAA to ZZZ is reserved for customer-specific relationships. Relationships between objects are reciprocal. If a job describes a position, then the position, in turn, is described by the job. The direction of these relationships is distinguished by using the identifiers A or B in the relationship name.

You need to create a relationship only for one direction. The inverse relationship is created automatically by the system.

A relationship can also be one sided, in that it exists in only one direction. Relationships to objects of an external object type (for example, a cost center in Controlling) are often one sided.



## Organizational Units



By creating relationships between organizational units, you create an organizational structure.

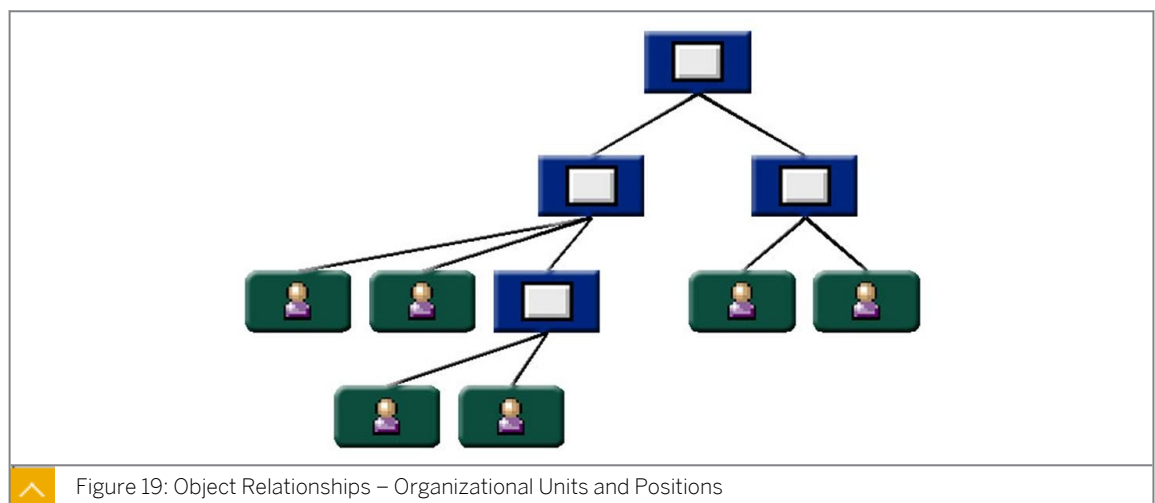
An organizational unit can have many subordinate organizational units, but only one higher-level organizational unit.

**The following table shows some examples of standard relationships between organizational units:**

Org. Unit Relationship Type	Standard Relationship
A 002	An organizational unit reports to another organizational unit.
B 002	An organizational unit is line supervisor of another organizational unit.

A/B003 (belongs to/incorporates) is one of the relationship types that can be used to map a matrix structure. A/B003 is also used to map organizational units and positions.

## Organizational Units and Positions



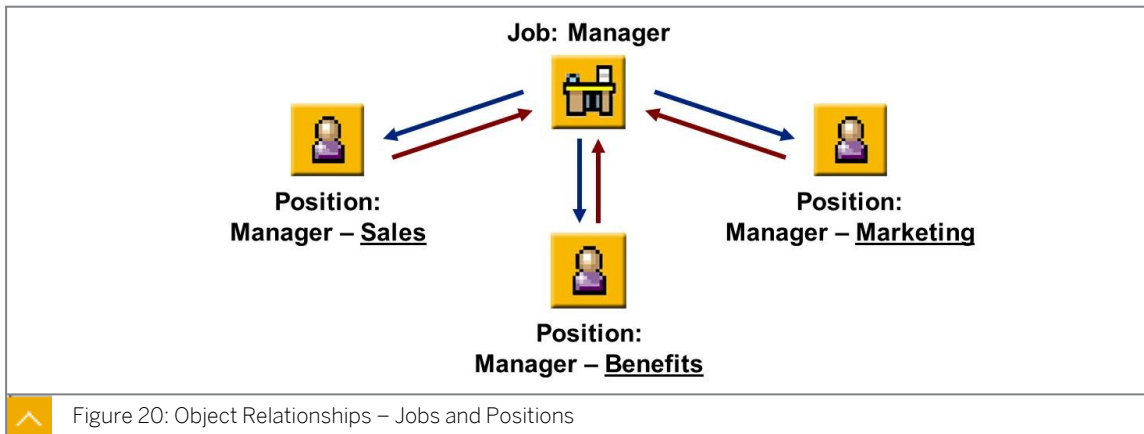
Positions are linked to organizational units in the organizational plan. They inherit certain characteristics of the organizational unit, such as cost center assignment or working time.



The following table shows the relationships between a position and an organizational unit:

Organizational Unit Type	Standard Relationship
A 003	A position belongs to an organizational unit.
B 003	An organizational unit incorporates a position.

### Jobs and Positions



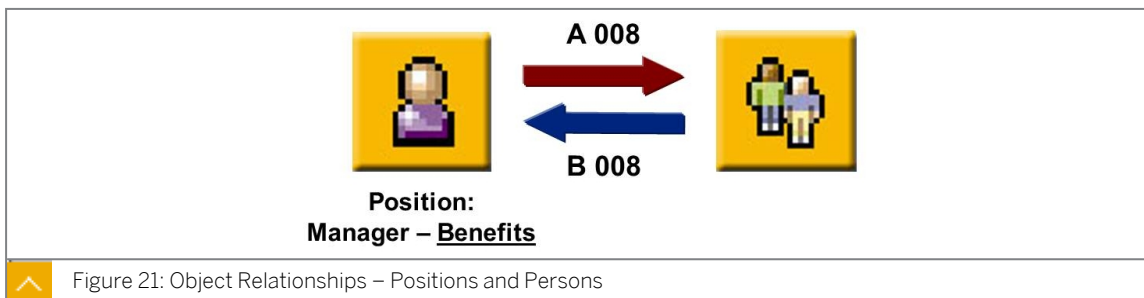
When a position is created based on a job, it inherits the characteristics of the job, such as associated tasks or qualifications.

Jobs can describe many positions; however, a position can be described by only one job.

The following table shows the relationships between a job and a position:

Organizational Unit Type	Standard Relationship
A 007	A job describes a position.
B 007	A position is described by a job.

### Positions and Persons



The position is the object that links persons or users to the organizational plan.



A position can be held by more than one person or user and a person can hold more than one position. However, a one-to-one ratio is the ideal scenario.

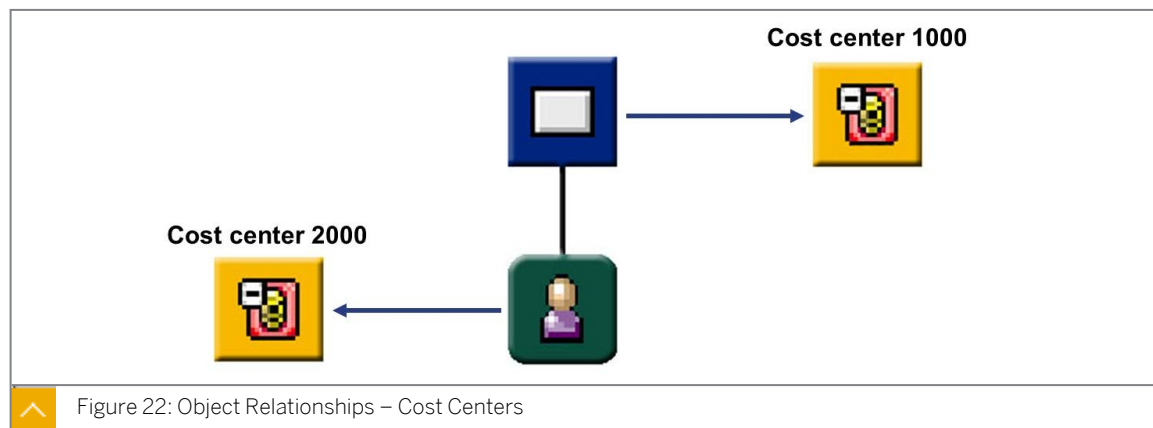
The following table shows the standard relationship between a person and a position:

Organizational Unit Type	Standard Relationship
A 008	A person is assigned as the holder of a position.
B 008	A person is the holder of a position.

Other relationships between persons and positions are as follows:

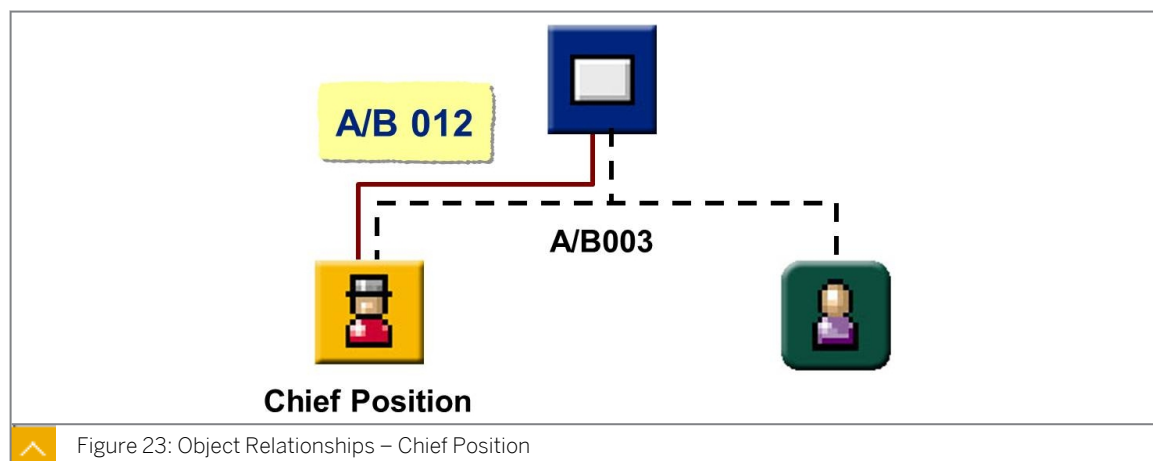
- A/B009: Successor
- A/B010: Substitute

### Cost Centers



An organizational unit or a position is assigned to a cost center by using relationship A 011.

### Chief Position



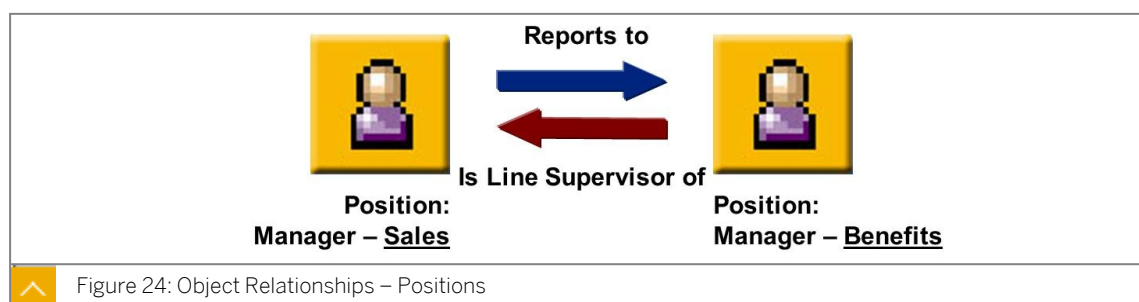


The table shows the relationships that exist when a position manages an organizational unit in a standard system:

Organizational Unit Type	Standard Relationship
A 012	A position manages an organizational unit.
B 012	An organizational unit is managed by a position.

This relationship is also created for A/B003 between the chief position and its higher-level organizational unit. A position which will be designated as the chief must first belong to the organizational unit with the 003 relationship.

### Positions



The relationships between positions form the reporting hierarchy that can be evaluated independently of the organizational structure.

In some organizations, the reporting structure, that is, the specialist or disciplinary relationship of one position to another, is based on the simple assignment of positions to organizational units. In this case, you do not need an additional reporting structure.

If, however, the actual reporting structure of your enterprise differs from the reporting structure determined by the organizational structure, you can model it with the relationships.

The table shows the standard relationship:

Organizational Unit Type	Relationship
A 002	A position reports to another position. Example: The position Payroll Administrator position reports to the position Payroll Manager.
B 002	A position is line supervisor of another position. Example: The Payroll Manager position is the line supervisor of the Payroll Specialist positions.

Other relationships between positions are shown in the table:

Organizational Unit Type	Relationship
A/B 004	Is subordinate to (disc.) / is disc. supervisor of



A/B 210

Substitutes with profile / Substitutes with profile

## Maintaining Relationships



Relationship	Relationship Bottom Up	Relationship Top Down	
001	Is a subdivision of	Is subdivided into	▼
002	Reports (line) to	Is line Supervisor of	
003	Belongs to	Incorporates	

- **Relationship characteristics**
- **Allowed relationships**
- **External relationships**
- **Time constraints**

Figure 25: Maintaining Relationships

The Relationships infotype (IT1001) can include multiple relationships.

Relationship properties allow you to control how the system responds to the criteria defined in Customizing for a relationship. The possible responses include error messages, warnings, or information. For example, if the 100% mark is exceeded in the case of weighted relationships, the system outputs either an error message, a warning, or an informational message.

### Relationship properties include the following:

- Additional relationship information

You can determine whether additional relationship information can be maintained and whether the weighting percentage of a relationship needs to be shown or hidden. Additional information that is customer-specific can only be entered for customer-specific relationships, and then only by agreement with SAP.

- Allowed relationships

You can define the object types that are allowed for each relationship type.

- External relationships

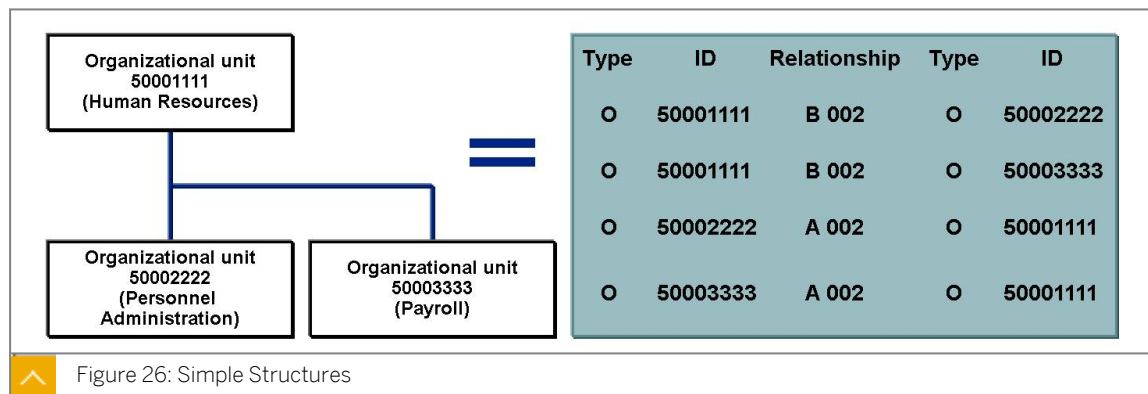
External relationships are the relationships that are not stored in the HRP1001 database.

- Time constraints

You must assign a time constraint to each relationship, depending on the object type. If you want the time constraint to also be dependent on the target object type, you must maintain this setting in the step Define Time Constraint Depending on Target Object Type.



## Simple Structures

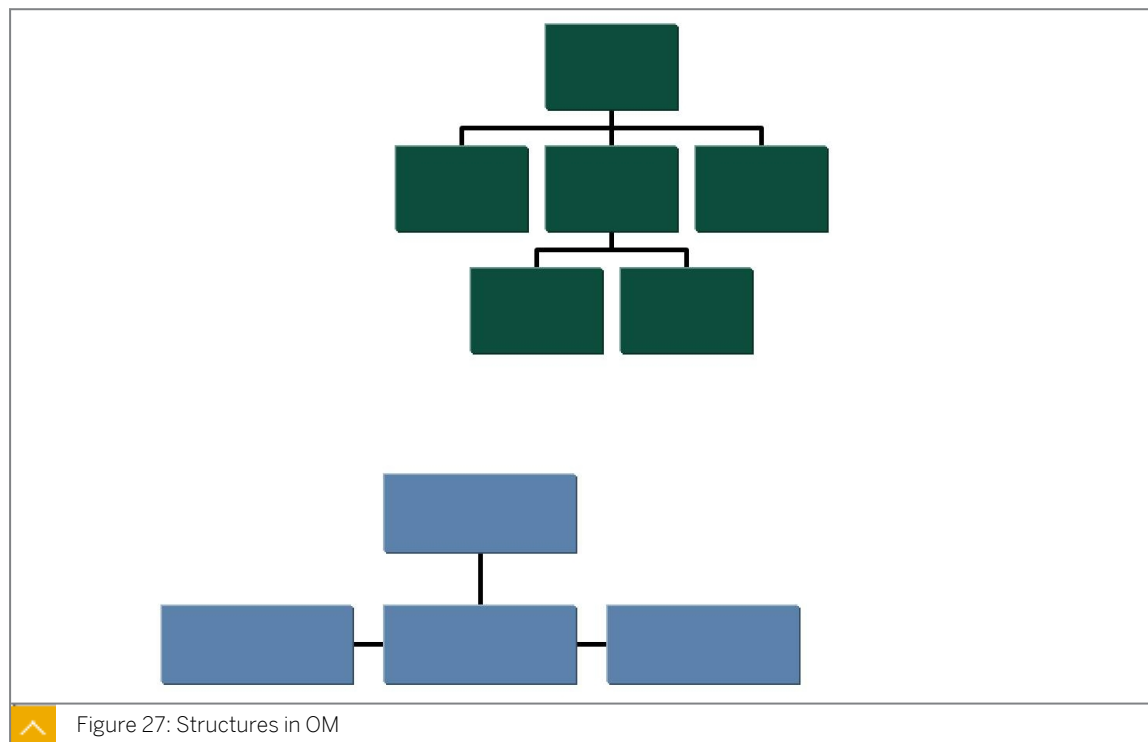


You can view relationships as table entries. Relationships between organizational objects exist only as table entries in the database. You can display the table entries as such in the relevant transactions.

In the example shown in the figure Simple Structures, two entries exist with the relationship key B002 for the higher-level organizational unit 50001111.

All relationships between internal objects are stored for each object in the logical database PCH. External objects such as cost centers or users do not store data in the database.

## Structures in OM



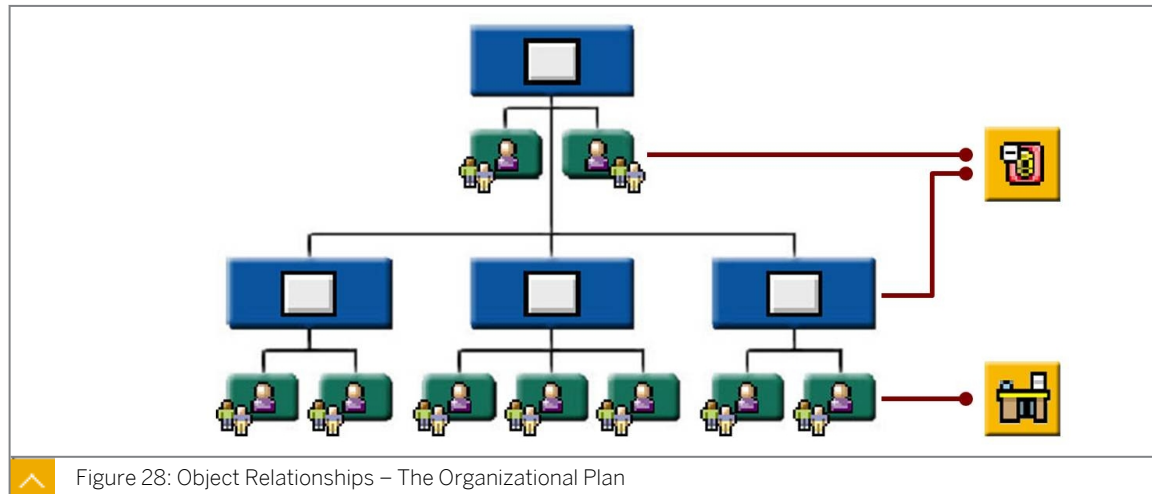
The organizational plan enables you to map the structure of your company based on the tasks and functions that are performed within it. You decide which areas of your company you want to include in the organizational plan.



**Some of the structures that can be created in OM are:**

- A task and function-related organizational model
- An organizational model structured according to financial or geographic criteria
- A model of the reporting structure
- A model of an alternative reporting structure

In addition to a one-dimensional, hierarchical organizational plan or reporting structures, you can map a multi-dimensional matrix organization.

**The Organizational Plan****The relationships between basic objects result in the following structures:**

- Organizational structure
- Reporting structure
- Staff assignments

The organizational plan enables you to map the structure of your enterprise dynamically. The structure therefore changes as your company changes.

The organizational structure maps the arrangement of the organizational units with one another. To create an organizational structure, you need to create and maintain organizational units, which you can then link to each other. The organizational structure is the basis for the creation of the organizational plan.

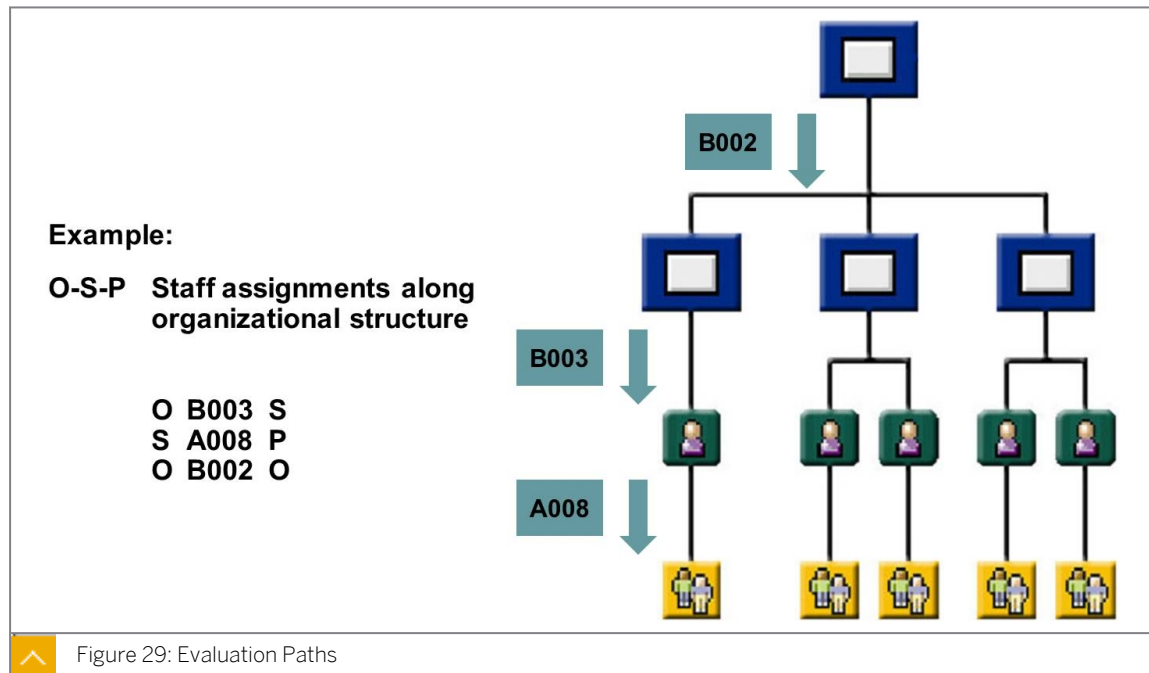
If the actual reporting structure of your enterprise differs from the reporting structure determined by the organizational structure, and the relationships between positions are one-dimensional and hierarchical, you can map these in a reporting structure.

Staff assignments represent the assignment of positions to organizational units, and the relationships between positions and persons. You create staff assignments by creating positions (based on jobs), assigning them to an organizational unit, and allocating a position holder to them.

Each of the organizational structures is displayed using an evaluation path.



## Evaluation Paths



An evaluation path represents a chain of relationships between particular object types in an organizational structure.

Evaluation paths define how a structure is created. It is not always possible for all of them to be included in a single view, because objects can have multiple relationships.

You can specify the objects in Customizing. You can also specify the relationships that the evaluation path selects and the order in which they are selected. The standard SAP system includes settings for standard reports.

For example, to view staff assignments along the organizational structure, you start with an organizational unit and identify relationships to positions. Then, from the positions, you can identify persons holding those positions. After this cycle is complete, you can progress to a subordinate organizational unit, where you start the cycle again.



### LESSON SUMMARY

You should now be able to:

- Find object relationships used to depict the organizational structure



# Planning Options in Organizational Management

## LESSON OVERVIEW

This lesson shows you how to depict future-oriented structures or plans in Organizational Management (OM). It also explains how to use plan versions, plan statuses, and validity periods for planning in OM.

### Business Example

Your company has decided to implement OM. You need to understand the concepts and structures so that you can supervise the creation and maintenance of your company's organizational plan in the system. For this reason, you require the following knowledge:

- An understanding of the planning options in OM
- An understanding of how to use plan versions, plan statuses, and validity periods
- An understanding of the concepts of time constraint and inheritance

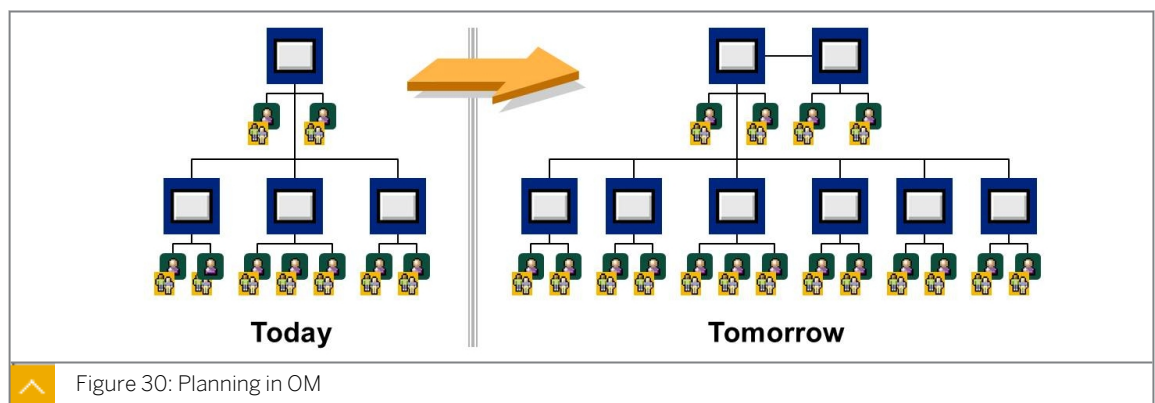


## LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Confirm the setup of plan versions to enable organizational planning
- List object characteristics to ensure appropriate associations are set up

## Organizational Planning



**OM enables you to depict your company in the past, present, and future using the following information:**

- Validity periods
- Plan versions



- Plan statuses

The figure Planning in OM shows the existing organizational structure of an enterprise on the left. Using OM, you can plan any type of enterprise restructuring or reorganization and then reproduce the structure in the system. This enables you to prepare for future staff requisitions or changes and respond to the situation accordingly.

### Methodology: Plan Versions

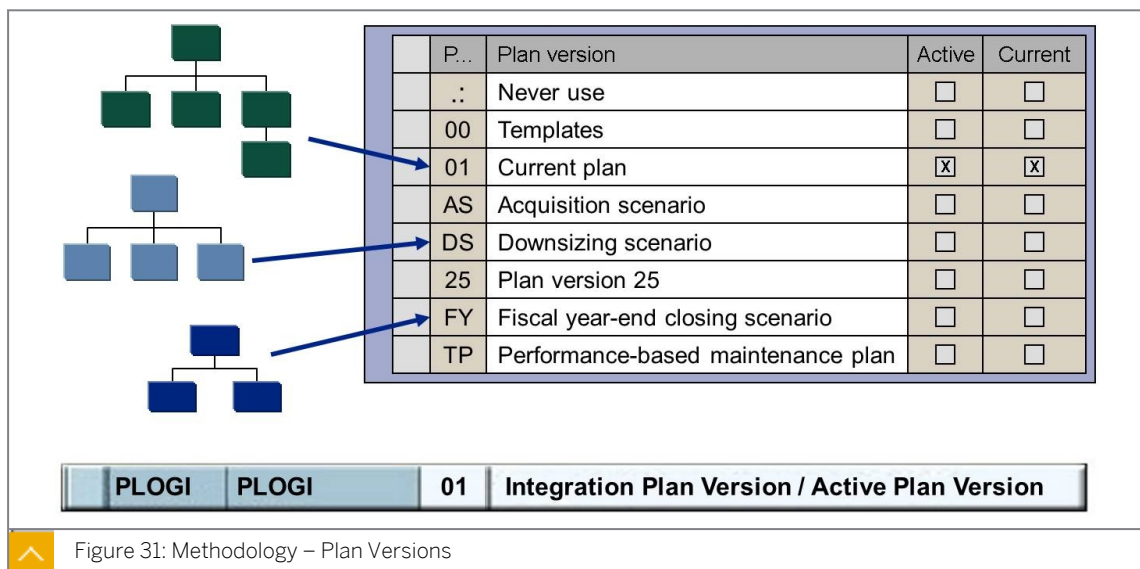


Figure 31: Methodology – Plan Versions

Plan versions allow you to depict and manage several organizational plans in the system at the same time. You can use plan versions to simulate and compare various scenarios. However, only one plan version can be integrated. This plan version represents the valid organizational plan, and is flagged as the active or integrated plan version.

You must define the active plan version when you integrate the SAP system.

As a rule, you cannot change the active plan version at a later date. If integration is active, the plan version you select here as active is the integrated plan version, regardless of the system. In the parameter group *PLOGI PLOGI*, enter the plan version that is to be the active plan version in the *Semantic Abbreviation Value* field. Once you designate a plan version such as 01 as the active plan version, as a rule it should always be 01. You can update it directly in production or make copies of it to complete various plan scenarios. For example you might copy 01 to 10, 11 and 12. The best case scenario is represented by 10, 11 represents the worst case, and 12 represents an average case scenario. Once the new version is selected, it is copied back into plan version 01 with an effective date. Plan version 01 should always be the active plan version once it is set up that way.

Plan versions exist independently of each other. They can be created as copies of the original plan in statements by using report *RHCOPLOO Copy Plan Version*. You can change this copy independently of the valid plan. While this option is advantageous, it means that handling plan versions is more complicated.

After the copy is created, both plan versions develop independently of one another. Consequently, the best copy is out-of-date after a matter of hours or days.

Report *RHCOPLPT Reconcile Plan Version* supports you when transferring data from an inactive plan version to the active and integrated plan version. However, this report is not able to update personal data in infotype 0001. This can lead to inconsistencies in the integration between Personnel Administration (PA) and Personnel Planning (see SAP Note 354019).



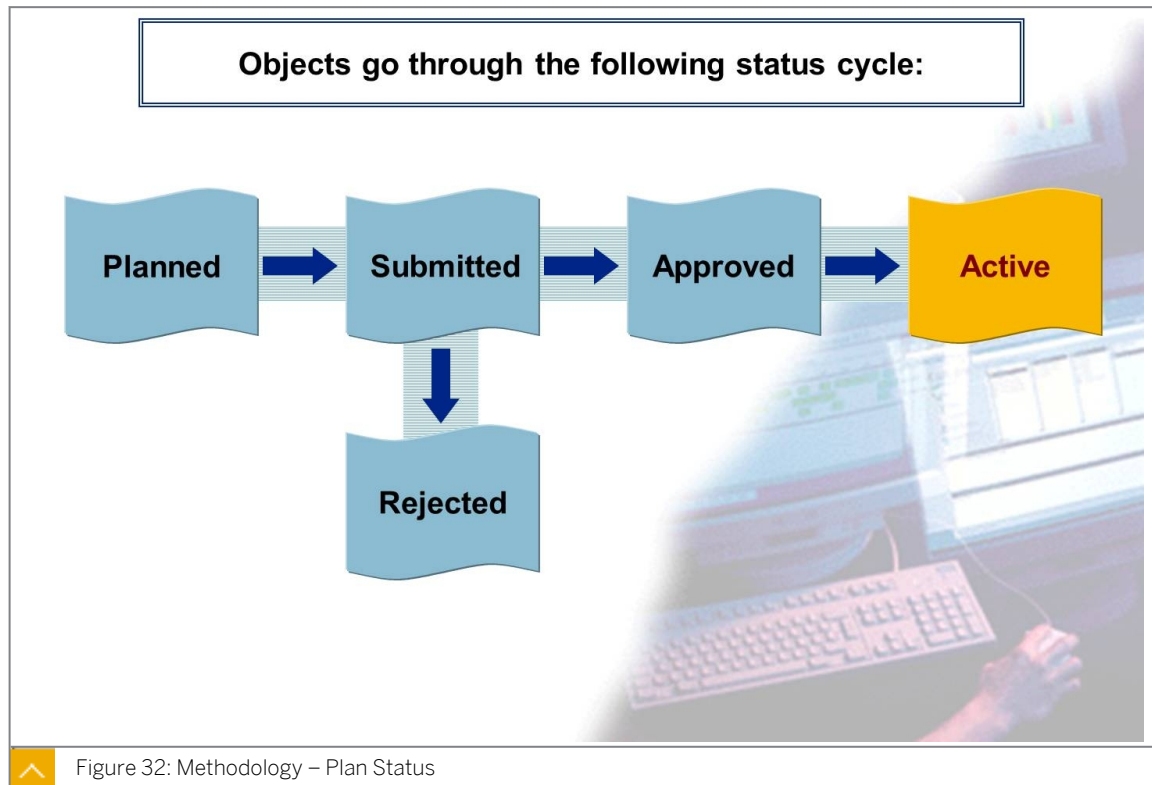
The current plan version is the plan version that you are currently working on in the system. You can use the `OM_FRAM_PLVAR_DISP` switch in the user profile to display the active plan version on the *Change Organization and Staffing* interface.



**Note:**

You must not use or delete the plan version “.:” because it is used for transporting data to other clients or systems.

### Methodology: Plan Status



Infotype records can go through a planning cycle during which they must be accepted or rejected. A plan status is assigned to each infotype record.

**An infotype record can be assigned any one of the following statuses:**

- **Planned status**  
The planned status indicates that an infotype record (that is operable) is proposed, but not currently active.
- **Submitted status**  
The submitted status indicates that an infotype record has been submitted for review and subsequent approval or rejection by a person or group of persons.
- **Approved status**  
The approved status indicates that an infotype record (that was previously submitted for review) has been accepted or approved.
- **Rejected status**



The rejected status indicates that an infotype record (that was previously submitted for review) has been rejected.

- Active status

The active status indicates that an infotype record is currently operable.

Objects can be created in either planned or active status.

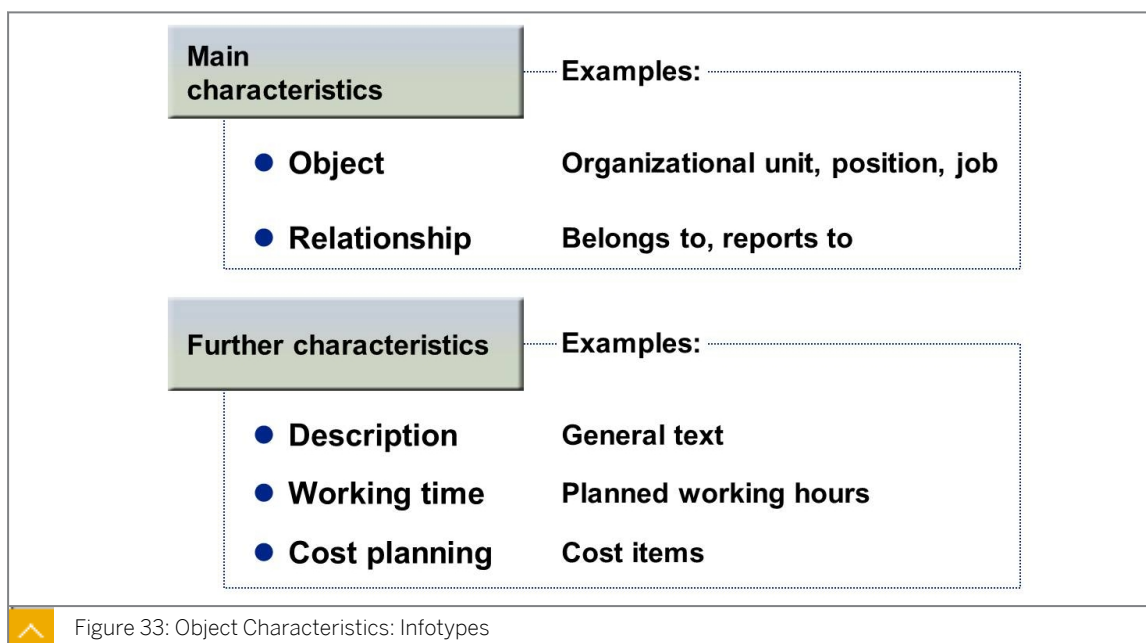
You must assign a status for every infotype record you create. You do not, however, have to use all the statuses. Many companies only use the active status.

You cannot use plan statuses with all interfaces. Plan statuses are primarily intended for use with the approval procedure in workflow.

The majority of maintenance interfaces can create and maintain only infotype records with the active status.

The report *RHAKT100* allows you to change the status of several objects at the same time.

## Object Characteristics



Object characteristics are maintained in infotypes.

The *Object* (IT1000) and *Relationships* (IT1001) infotypes are the two most important infotypes. These infotypes are referred to as the main properties or main characteristics.

The *Object* infotype includes the ID number, short and long text, validity period, and plan status. This infotype is used to define the existence of the object.

The *Relationships* infotype links the objects with other objects. This infotype provides the individual objects with their relevance in the system.

The other infotypes enable you to define particular business characteristics for an object.

Some infotypes can be maintained for all object types, for example the *Object* and *Relationships* infotypes. Others infotypes are only relevant for particular object types. For example, the *Vacancy* infotype is relevant only for positions and the *Character* infotype is



relevant only for tasks. Not all infotypes are absolutely necessary. However, they can provide important information about objects.

## Number Ranges



Group	Sem. Abbr.	Value Abbr.	Description
NUMGR	COMP		Number assignment for all plan versions

Subgroup	NR Int. Assignment	NR Ext. Assignment
\$\$\$\$	IN	EX
01\$\$	IN	EX
01A	IN	EX
01B	IN	EX

Number Range					
No.	From Number	To Number	Current Number	Ext.	
EX	00000001	49999999	EX	<input checked="" type="checkbox"/>	
IN	50000000	99999999	50010581	<input type="checkbox"/>	

Figure 34: Number Ranges

You can specify whether number assignment is specific to the plan version or whether it applies to all plan versions. If you decide to use plan version-specific number assignment, you can define number intervals for each plan version and object type.

For example, subgroup 10S represents the number assignment for object type S in plan version 10.

If you decide to use number assignment for all plan versions, you can define number intervals per object type that are valid for all plan versions in the Maintain Number Ranges step.

For example, subgroup \$\$O represents the number assignment for object type O in all plan versions.

Number assignment for all plan versions has the advantage that objects will not be overwritten when they are copied from one plan version to another.

The subgroup names are set up so that the first two characters specify the plan version and the last two specify the object type. The standard entry \$\$\$\$ in the *Subgroup* field stands for all number ranges that are not listed explicitly. This entry must not be deleted. You can differentiate between external and internal number assignment in each subgroup.



## Object ID



Number Range						
No.	From Number	To Number	Current Number	Ext.		
EX	00000001	49999999	EX	<input checked="" type="checkbox"/>		▲
IN	50000000	99999999	50010406	<input type="checkbox"/>		▼

Figure 35: Object Characteristics – Object ID

When an object is created, an object ID must be assigned to it. The object is identified by a combination of plan version, object type, and object ID. Object IDs are numeric. They cannot contain any letters.

### The object ID can be assigned in the following ways:

- Internal assignment

In this case, the system automatically assigns an object ID from the corresponding number range to the object being created. Internal number assignments are indicated by the letters IN.

- External assignment

In this case, a user, an administrator, or another system assigns the number. External number assignments are indicated by the letters EX.

You maintain number ranges for object IDs in Customizing.

You can easily search for objects by using search terms, parts of a term, and certain characteristics. It is recommended that you use internal number assignment, because you do not need the object ID to search for objects.

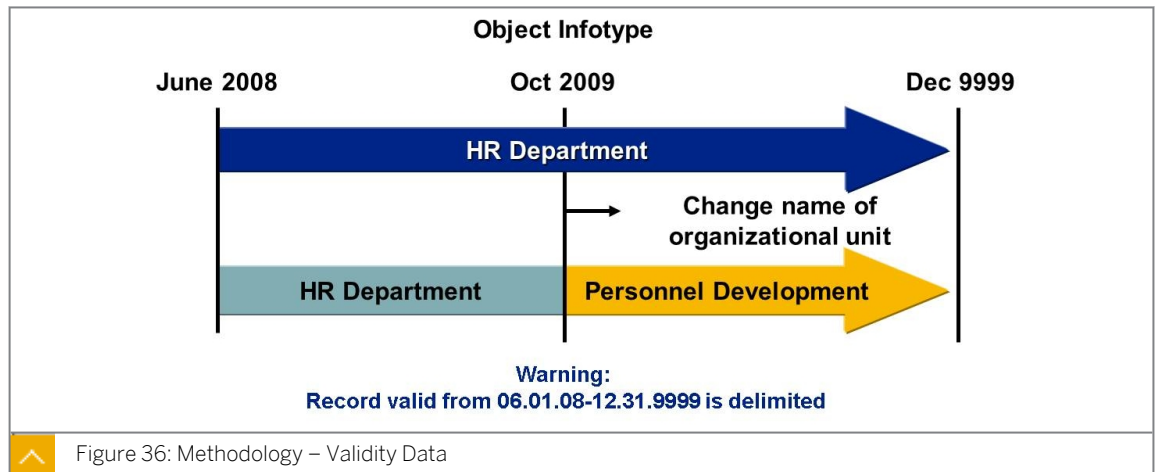


#### Hint:

The name of the object is not a part of the object key. This allows the same object number to be maintained in several languages.



## Validity Data



Each infotype record uses a start date and an end date to specify the validity period for the infotype data. You must assign a validity period to every infotype record you create. When you assign the validity period, you can depict all the changes that take place in your company, and get a dynamic view of your enterprise.

### The key characteristics of a validity period are as follows:

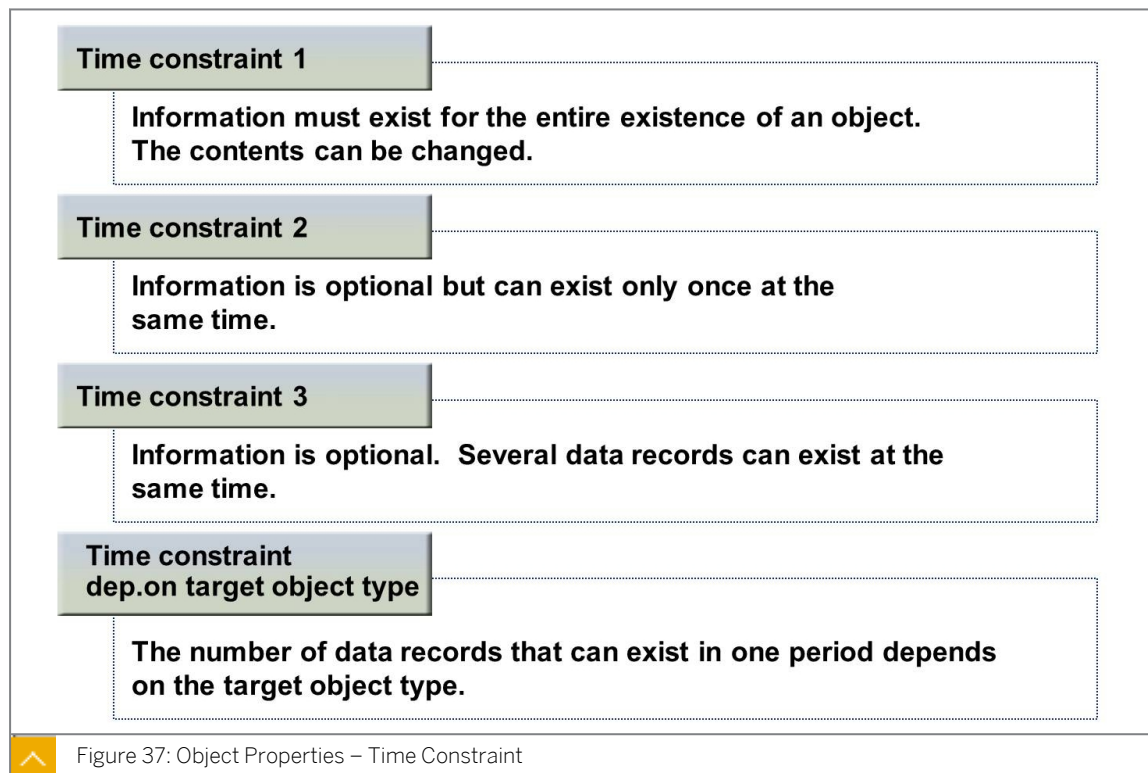
- It allows you to define the life span of an infotype record.
- It identifies changes to your organization while retaining historical data.
- It allows you to evaluate the organizational structure on key dates.

The validity period enables you to evaluate key data or periods in the past, present, or future. The validity of an object's relationships and attributes can exist only within the life span of the object defined in the *Object* infotype.

If an object is delimited, all the object's relationships and characteristics are also automatically delimited. Related objects are not changed. However, a relationship is valid only if both objects are valid.



## Time Constraint



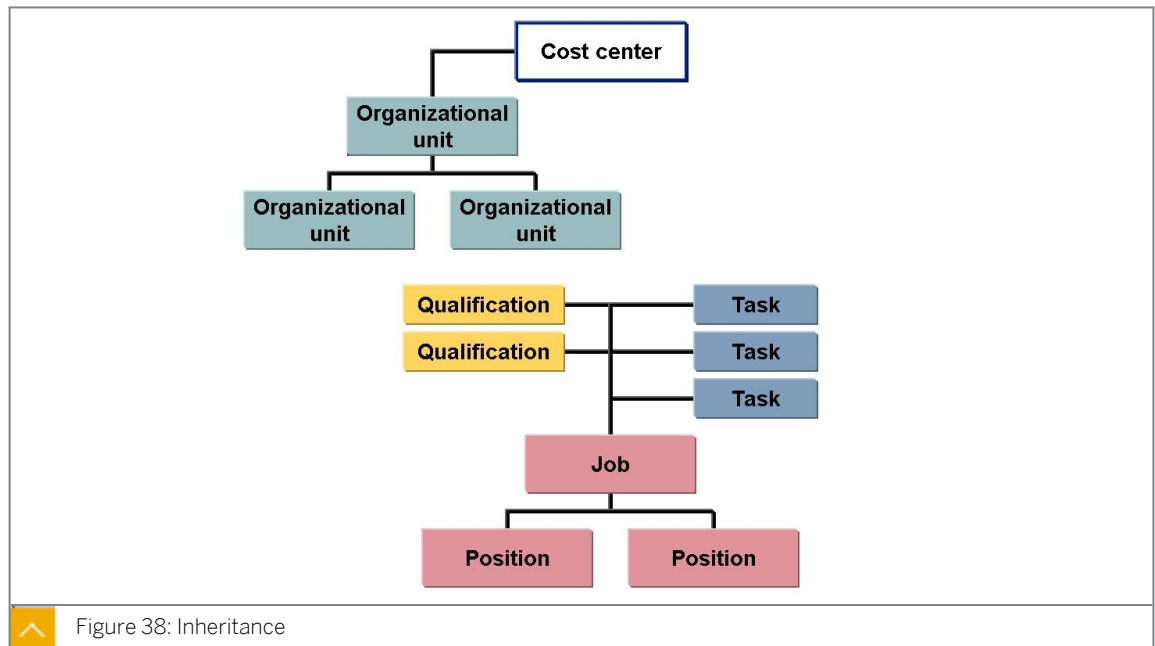
Time constraints are used internally by the system to guarantee the integrity of data. You use time constraints to control system reactions according to company-specific requirements. For example, if you want to let positions report to a number of supervisors, you can set up a time constraint to allow several relationships to exist.

### Examples of the time constraints that can be implemented are as follows:

- **Time constraint 1**  
The object must always have a short name. An object with time constraint 1 cannot have any time gaps in the dates assigned to the information on the infotype. However, changes can be made to the attributes of the record.
- **Time constraint 2**  
For example: A position cannot have more than one Vacancy infotype record at any one time.
- **Time constraint 3**  
For example: An organizational unit (for example, Sales) can be linked to a number of positions simultaneously. Several data records can exist at the same time.
- **Time constraint that depends on the target object**  
For example: A position is described by one job only, but by several tasks. The number of data records that can exist in one period depends on the target object type.



## Inheritance



The figure shows that the following infotypes are inherited through relationships in OM:

- Organizational units inherit the cost center assignment of their higher-level organization unless an individual assignment is made.
- Positions inherit the tasks and requirements related to the job that describes them. Positions can also have direct relationships to tasks and requirements in addition to the inherited tasks.

In addition to this type of inheritance, other infotypes can be inherited.

## Change Documents for Personnel Development Infotypes



**T77CDOC\_CUST**

Plan Variant	Object Type	Infotype	Subtype	
01	O	1000	*	<input checked="" type="checkbox"/>
01	S	1001	*	<input checked="" type="checkbox"/>
				<input type="checkbox"/>

**Display Change Documents**

OT	ObjektID	Name	Subtype	Infotype	Start	End Date	OT	ID of Rel	Description	Name	Datum
	50003327	00 HR		1000	21.02.2005	31.12.9999				ERBM	21.02.2005
	50003327	00 HR		1000	21.02.2005	31.12.9999				ERBM	21.02.2005
	50007653	00 Administrator	A003	1001	21.02.2005	31.12.9999		50003327	00 HR	ERBM	21.02.2005
	50007653	00 Administrator	A003	1001	21.02.2005	31.12.9999		50003327	00 HR	ERBM	21.02.2005
	50007653	00 Administrator	B007	1001	21.02.2005	31.12.9999		30018289	00 Administrator	ERBM	21.02.2005
	50007653	00 Administrator	B007	1001	21.02.2005	31.12.9999		30018289	00 Administrator	ERBM	21.02.2005
	50007653	00 Administrator	B007	1001	21.02.2005	31.12.9999		30018289	00 Administrator	ERBM	21.02.2005

**Report RHCDOC\_DISPLAY**

Figure 39: Change Documents for Personnel Development Infotypes

Change documents can be generated for *Personal Development* infotypes. They enable you to track changes made to individual infotypes.



Change documents for *Personnel Planning* infotypes are based on the SAP Change Document solution (transaction *SCDO*) and change document objects. Application development can create change documents. The change documents represent the application objects in HR Change Documents. You can assign database tables to each change document object and changes made to the data are logged by using the change document object. You must enter the infotypes for which you want to activate the creation of change documents in table *T77CDOC* (*Management of Change Doc. Object Class for Infotypes*).

The SAP system includes standard implementations for creating change documents for *Personnel Planning* infotypes. In the case of standard implementations, infotypes are already connected to HR Change Documents. No additional infotype-specific source code is required.

In the Customizing table *T77CDOC\_CUST* (*Activate HR Change Documents*), you can activate the creation of change documents for specific infotypes, plan versions, object types, and subtypes.

In the SAP standard system, HR Change Documents is deactivated for all infotypes. You can only activate infotypes that have been prepared for HR Change Documents, that is, those infotypes for which an entry exists in table *T77CDOC*. In the case of customer-specific infotypes, you must maintain the entries individually.

Report *RHCDOC\_DISPLAY* enables you to display the change documents created when changes were made to *Personnel Planning* infotypes using HR Change Documents. The selection options enable you to select the precise documents that you want to display.

**In report *RHCDOC\_DISPLAY* under infotype, you can make the following selections:**

- If you select a language-dependent infotype such as 1000, 1002, and so on, you can also select a language key for the object.
- If you select the *Relationships* infotype (1001), you can also enter the object type or ID to select the related object.

The planned status relates to the status of the infotypes and subtypes for which change documents are to be displayed.



### LESSON SUMMARY

You should now be able to:

- Confirm the setup of plan versions to enable organizational planning
- List object characteristics to ensure appropriate associations are set up



# Learning Assessment

1. Which of the following statements are true for Organizational Management (OM)?

*Choose the correct answers.*

- ☐ A OM has an object-oriented design.
- ☐ B Each element in an organization is represented by a stand-alone object.
- ☐ C OM cannot handle complex structures.
- ☐ D The characteristics of each object are maintained in infotypes.

2. Which of the following are basic object types in Organizational Management (OM)?

*Choose the correct answers.*

- ☐ A Job
- ☐ B Company code
- ☐ C Designation
- ☐ D Organizational unit

3. A position can be occupied by more than one person.

*Determine whether this statement is true or false.*

- ☐ True
- ☐ False



4. To link tasks to a set of positions that are all related to the same job, why do you first need to link the tasks to the job?

*Choose the correct answers.*

- ☐ A When you create positions based on the job, the tasks will be automatically transferred to the position.
- ☐ B Since tasks cannot be related to positions, they must be related to jobs.
- ☐ C A position inherits all the characteristics of the job that it is linked to. So, it inherits the job's relationships also.
- ☐ D It is the convention to first link the tasks to jobs and then link them to corresponding positions.

5. You need to create a relationship for only one direction. The inverse relationship is created automatically by the system.

*Determine whether this statement is true or false.*

- ☐ True
- ☐ False

6. When an organizational unit is the line supervisor of another organizational unit, which of the following relationship keys is used to depict this relationship?

*Choose the correct answer.*

- ☐ A B012
- ☐ B B002
- ☐ C A007
- ☐ D A003

7. Which of the following represents a chain of relationships between particular objects?

*Choose the correct answer.*

- ☐ A Organizational plan
- ☐ B Allowed relationships
- ☐ C Organizational structure
- ☐ D Evaluation path



8. Which of the following methods are used to depict your company in the past, present, and future?

*Choose the correct answers.*

- ☐ A Validity periods
- ☐ B Plan versions
- ☐ C Validity plans
- ☐ D Plan statuses

9. You must assign a status to every infotype record you create and you have to use all the statuses.

*Determine whether this statement is true or false.*

- ☐ True
- ☐ False

10. Using time constraints, you can control system reactions according to company-specific requirements.

*Determine whether this statement is true or false.*

- ☐ True
- ☐ False

11. If an infotype record is assigned an active status, it means that the infotype record is currently operable.

*Determine whether this statement is true or false.*

- ☐ True
- ☐ False

12. How is the number range for the internal numbers of object IDs indicated in Customizing?

*Choose the correct answer.*

- ☐ A EX
- ☐ B UP
- ☐ C IN
- ☐ D IA



### Learning Assessment - Answers

1. Which of the following statements are true for Organizational Management (OM)?

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- ☐ D A003

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*Determine whether this statement is true or false.*

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- ☐ False

12. How is the number range for the internal numbers of object IDs indicated in Customizing?

*Choose the correct answer.*

- ☐ A EX
- ☐ B UP
- ☒ C IN
- ☐ D IA



## UNIT 3

# Organization and Staffing Framework

### Lesson 1

Identifying the Organizational Plan

51

### Lesson 2

Updating the Organizational Structure

63

### UNIT OBJECTIVES

- Identify the setup of the organizational plan
- Modify the organizational structure by creating organizational objects
- Assign objects to the existing organizational structure







## Identifying the Organizational Plan

### LESSON OVERVIEW

This lesson explains the structure and functions of the *Organization and Staffing* interface.

### Business Example

You need to make changes to your organizational plan when the structure of your company changes. The *Organization and Staffing* user interface enables you to make the necessary changes to your organizational plan in the system. For this reason, you require the following knowledge:

- An understanding of the *Organization and Staffing* user interface



### LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Identify the setup of the organizational plan

### Hierarchy Framework

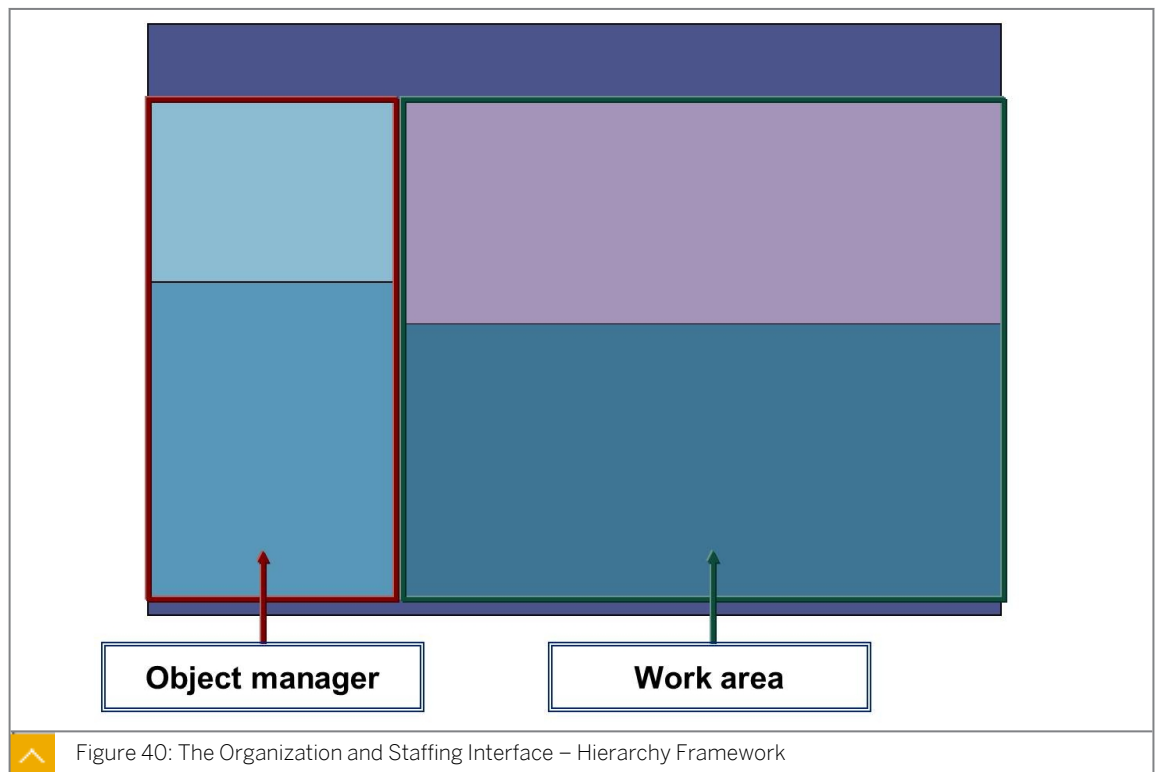


Figure 40: The Organization and Staffing Interface – Hierarchy Framework

The *Organization and Staffing* user interface is divided into the following main areas:

- Object manager



The object manager comprises a search area and a selection area. The object manager is available in numerous HR user interfaces. You can tailor the object manager to suit your requirements in Customizing.

- Work area

The work area is composed of an overview area and a detail area. The work area is specifically for the *Organization and Staffing* interface, and can also be adapted to suit customer-specific requirements. Each of these areas is further subdivided.

### Date and Preview Period

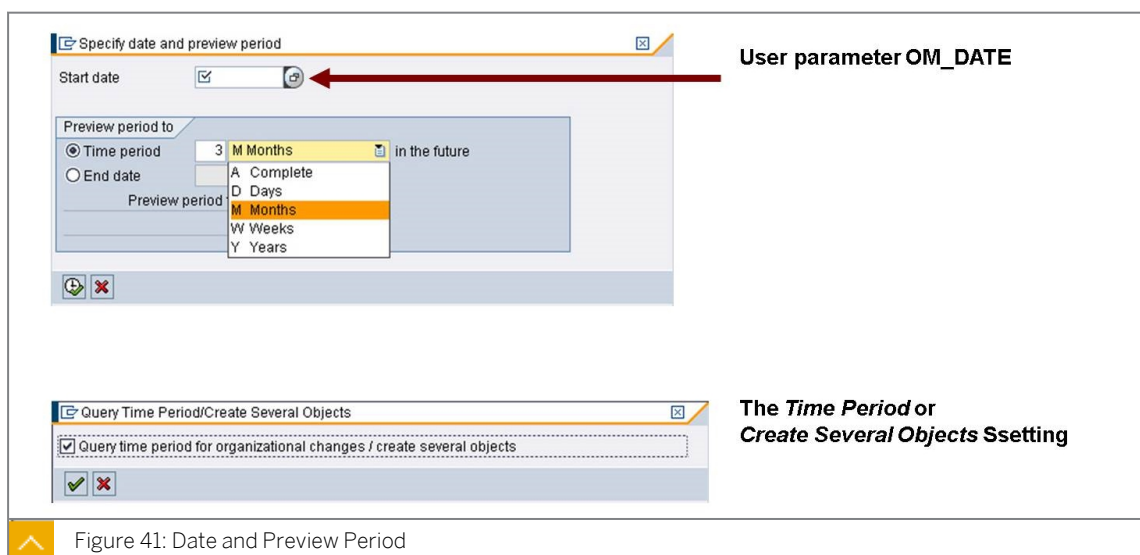


Figure 41: Date and Preview Period

You must specify the date and the preview period when you start a transaction. When you log on to the system, the system date is proposed as the start date of the preview period. You can change this date for individual sessions. The user parameter OM\_DATE in the format `yyyymmdd` allows you to enter a specific date as the default value for the start date.

The preview period is user specific. The first time you log on to the system, the preview period is defined as three months by default. All changes made during this period are displayed.

To depict organizational changes, you need to use the date and preview period. The date is considered as the start date for the objects' validity. New objects and relationships are then created with this date as the start date.

You can create a date query for the user by activating the *Query Time Period/Create Several Objects* setting. This means that although the system uses the default values for the date and preview period, the user can change the setting, if required. Furthermore, when activating this setting, you can create several objects at once in the window that is displayed. Special icons with arrows identify the objects whose validity ends or begins during the preview period that you have determined.



## Navigation Overview

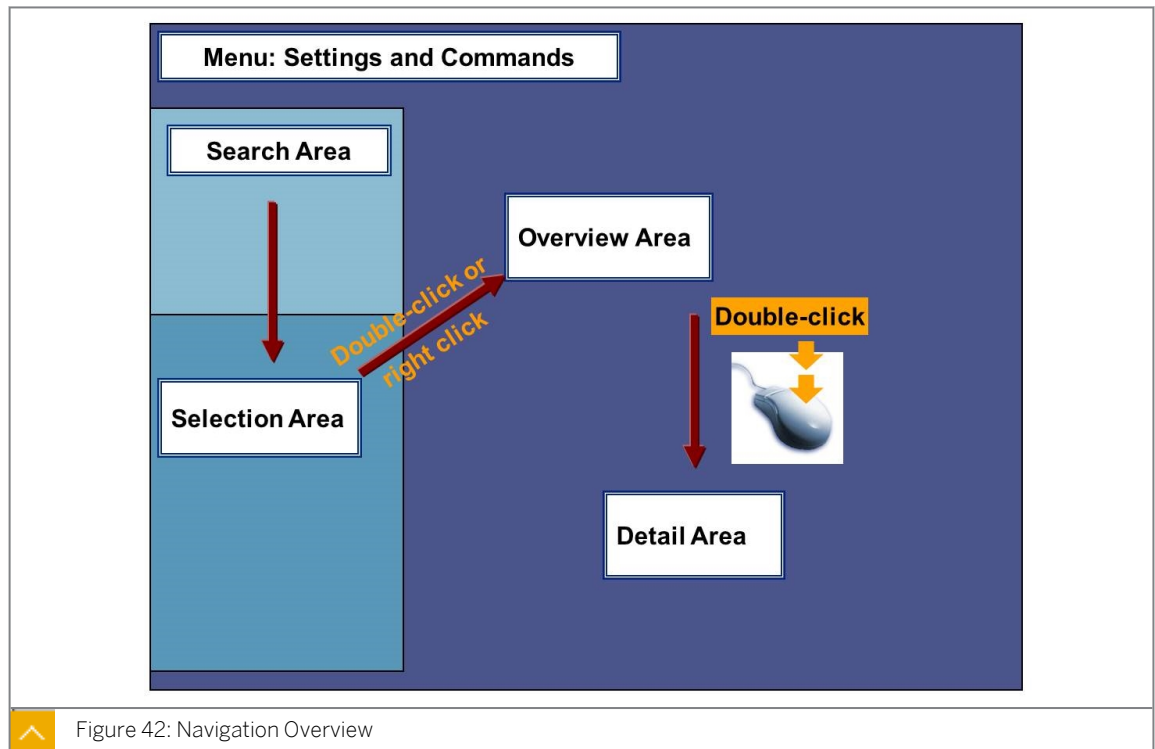


Figure 42: Navigation Overview

The table describes the various areas of the Organization and Staffing interface:

Area	Description
Search Area	In the search area, you can use the search function to locate objects such as organizational units, persons, jobs, positions, tasks, and users.
Selection Area	In the selection area, you can select an object that was obtained through a search, and use it in the overview or detail areas.
Overview Area	In the overview area, you can process selected objects in your organizational environment. Different evaluation paths are available here depending on the object type.
Detail Area	In the detail area, you can maintain detailed characteristics for the object that you have double-clicked in the overview area.



## Search Area

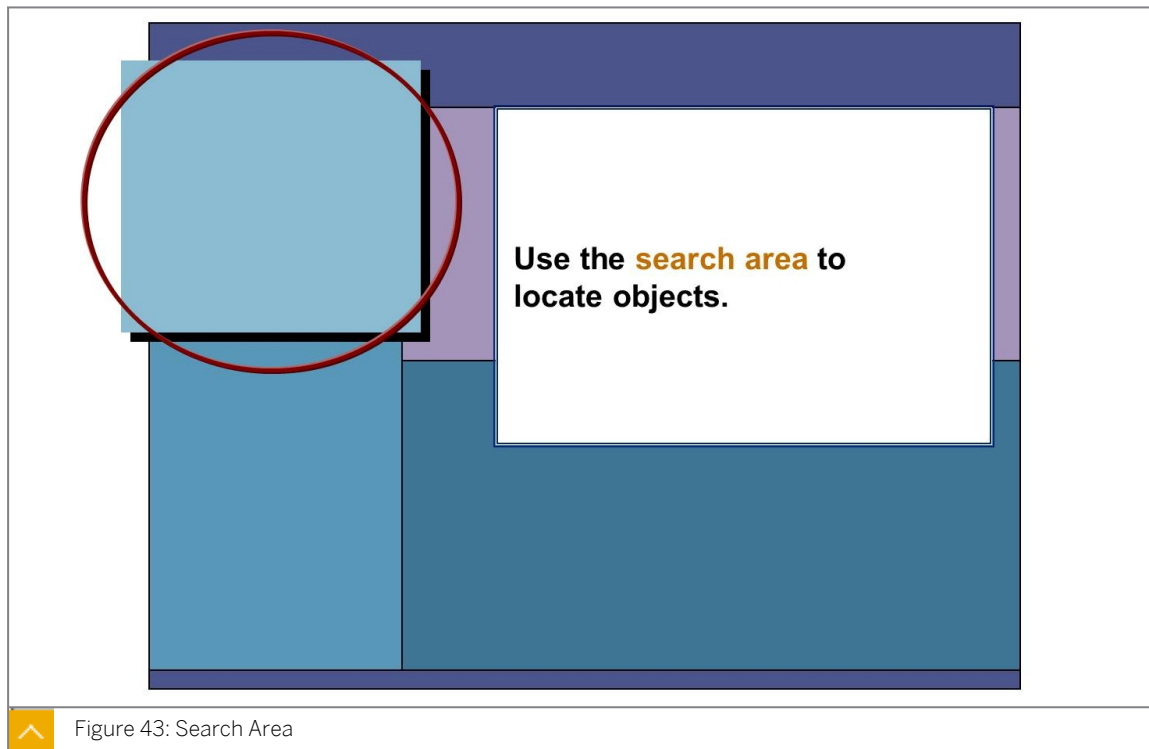


Figure 43: Search Area

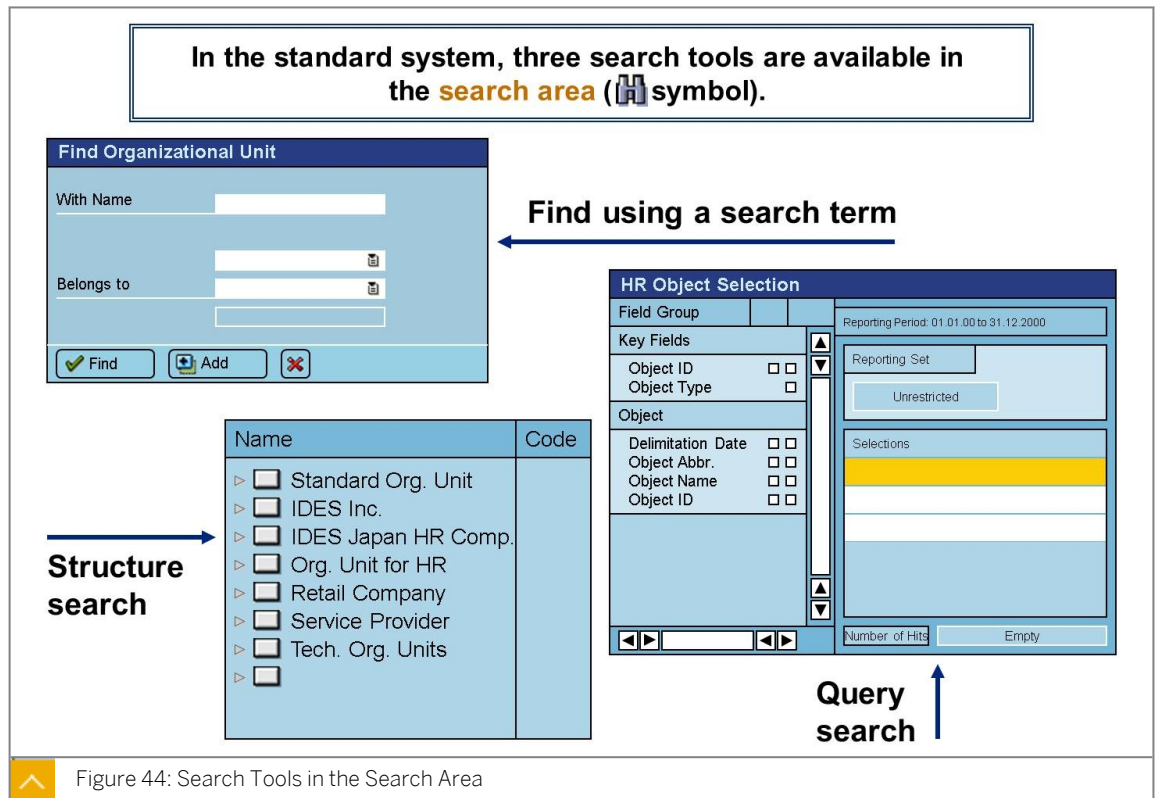
You can use the search tools in the search area to locate the objects you want to display or edit.

The search can also be based on the relationship with the other objects.

The search results can be stored as a search variant.



## Search Tools in the Search Area

**Characteristics of search functions include the following:**

- The objects you are searching for must exist.
- Some search functions are specific to the object type. When searching with a search term, enter the name or part of the name of the object you are looking for (you can use an asterisk (\*) as a wild card).
- You can restrict the number of hits, if required, by entering whether an object is directly or indirectly assigned to another object.
- The free search uses the Ad Hoc Query.
- When you search according to the structure, the entire structure is displayed in the selection area. You can select the object you wish to work with from the selection area.



## Selection Area

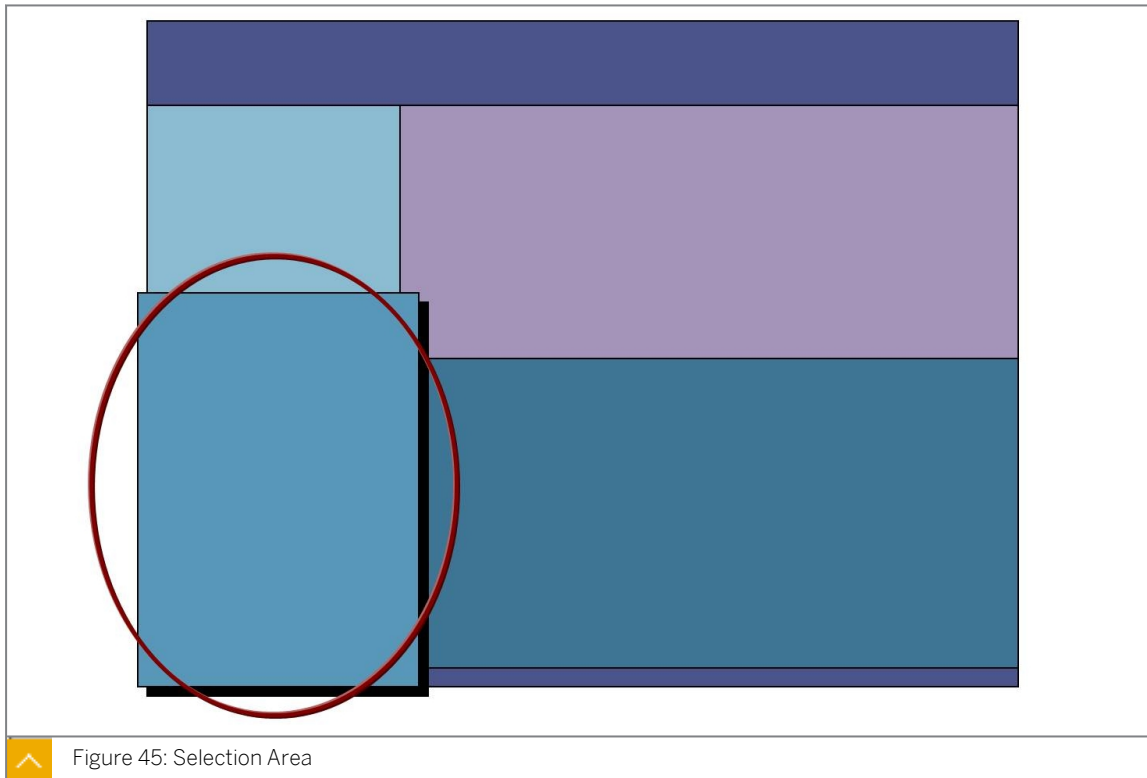


Figure 45: Selection Area

The objects obtained by the search are listed in the selection area.

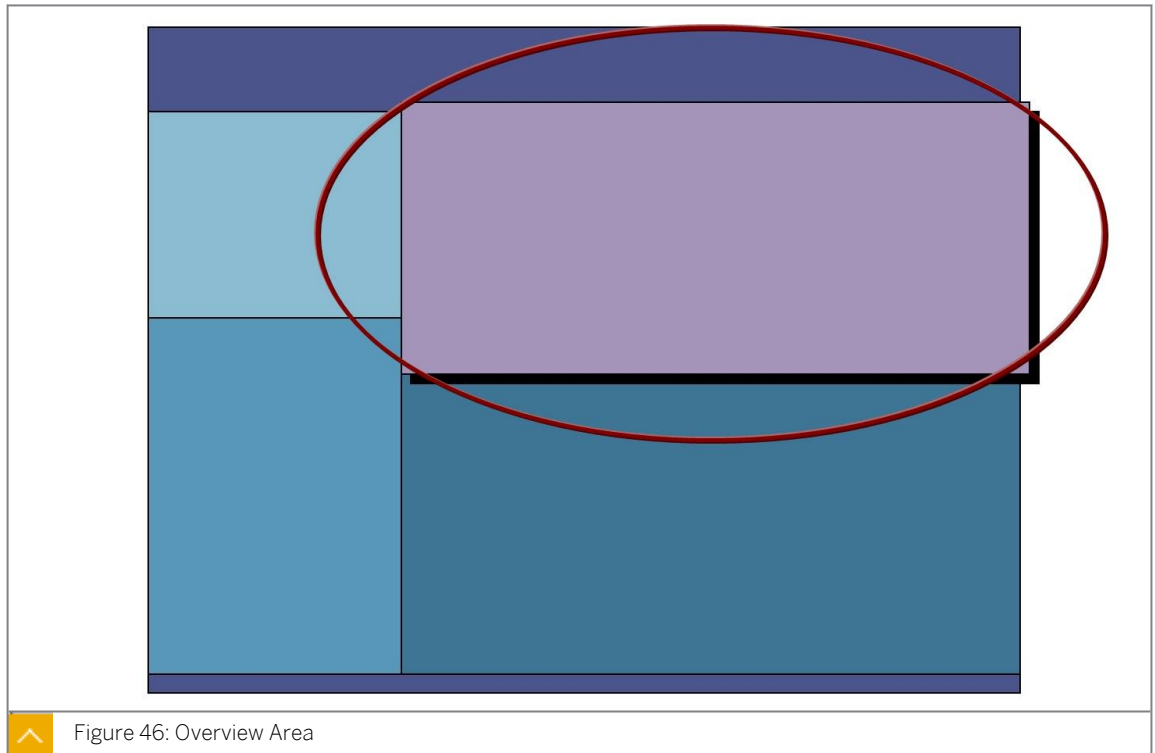
**To select an object, you can use one of the following methods:**

- Double-click the object. It is displayed with a standard evaluation path in the overview area.
- Right-click on a specific evaluation path to access the object directly in the overview area.
- Select one or more objects and assign them to another object in the overview area by drag and drop.

The selected object is displayed in the detail area for further processing.



## Overview Area



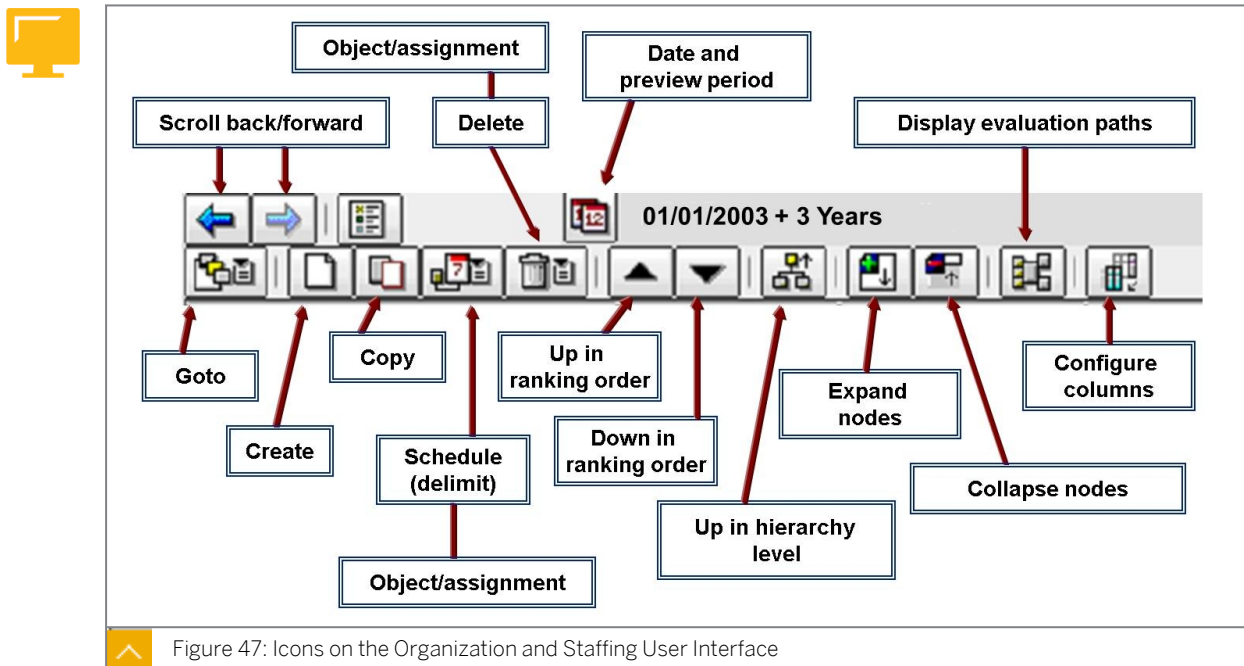
The selected object is displayed in the overview area as a list or a tree structure. The list is displayed in the overview area based on an evaluation path. You can use the *Goto* pushbutton to choose from a number of evaluation paths. You can double-click the object in the overview area to display the object characteristics in the detail area.

### You can display the following objects in the overview area:

- An organizational unit and its organizational structure
- The person in the staff assignment of an organizational unit
- The task assignment that shows the organizational units, positions, jobs, and persons related to the tasks

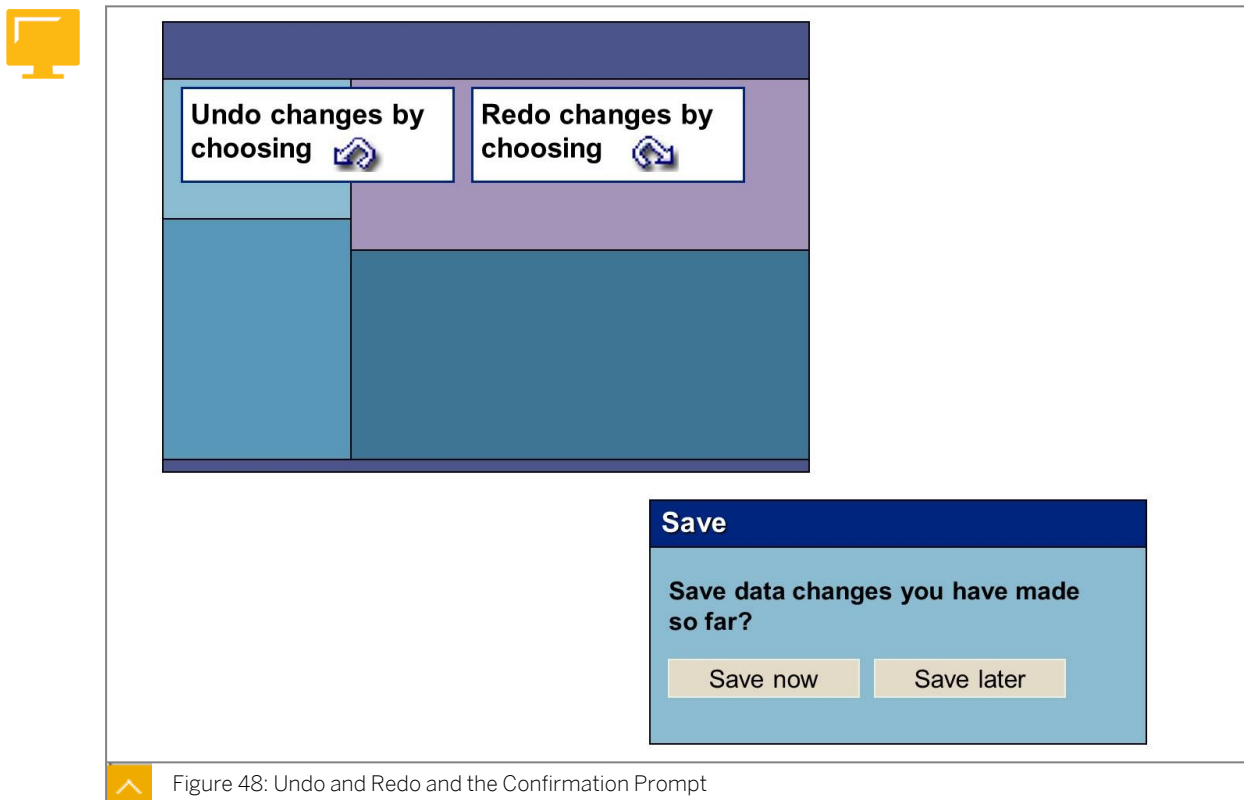


## Icons on the Organization and Staffing User Interface



The figure Icons on the Organization and Staffing User Interface shows the icons that you need to reference when you work with the *Organization and Staffing* user interface.

## Undo and Redo Function





You can undo or redo the changes made to the *Organization and Staffing* interface as long as the data is not saved.

Once you have carried out a specified number of changes, a dialog box appears prompting you to save the changes. In Customizing, you define the number of steps after which the dialog box appears.

## Evaluation Paths

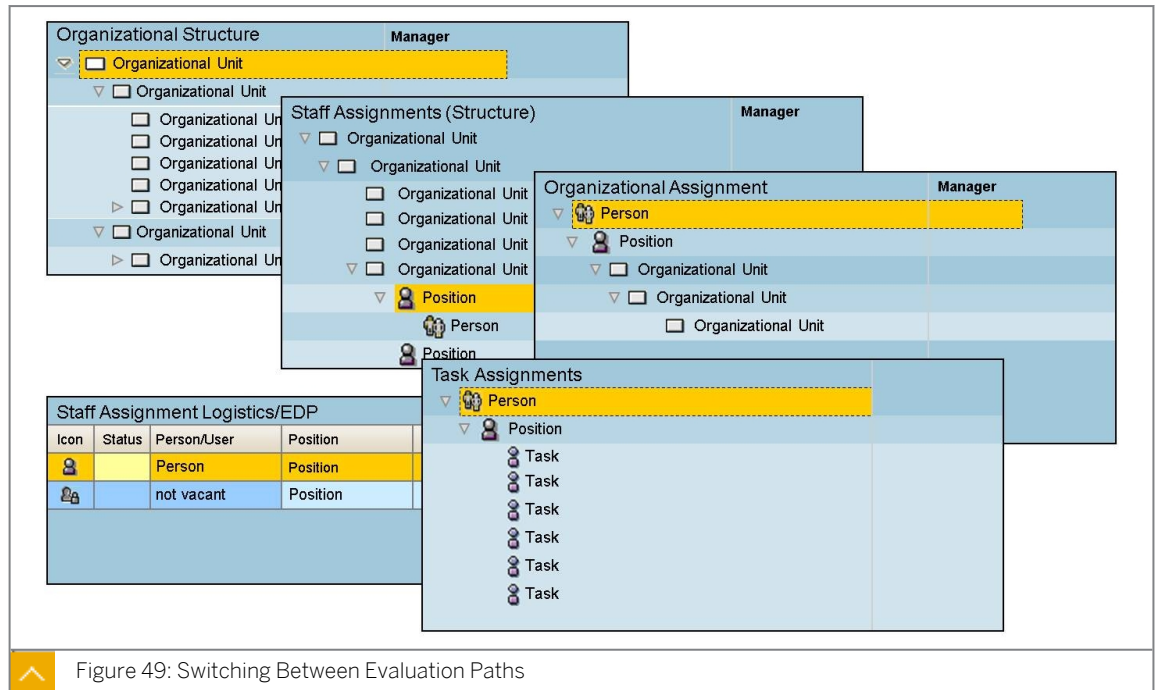


Figure 49: Switching Between Evaluation Paths

**Depending on the selected object type, the object's environment can be displayed as one of the following:**

- An organizational structure
- A reporting structure
- Staff assignments in the form of a list or a tree structure
- Task assignments
- Organizational assignments
- Job assignments
- Chief assignments
- Account assignments

Representations of the object's environment and other evaluation paths can be used in the overview area. If required, you can switch between these representations by clicking the relevant icon.

You can customize these evaluation paths to tailor them to customer-specific requirements.



## Detail Area



Figure 50: Detail Area

In the detail area, you can maintain object characteristics from the overview area. When you double-click an object from the overview area to select it, the properties of the object are displayed on the tab pages in the detail area. You can edit the characteristics of this object or add new characteristics.



**Note:**  
Tab pages group data that belongs together.

## Customizing the Hierarchy Framework

**You can make following settings in the object manager:**



- Define your own hierarchy framework scenario.
- Define your own search nodes (including object types).
- Adjust the search area.
- Redefine column headings.
- Display your own column group in the selection area.
- Define and add new columns for an object type (query).
- Configure columns.





**You can make the following Customizing settings to control the display of information in the overview and detail areas:**



- Adjust tabs in detail area.
- Add new infotype.
- Add new object type.
- Define and add new columns for an object type (query).
- Configure columns.



### **LESSON SUMMARY**

You should now be able to:

- Identify the setup of the organizational plan







## Updating the Organizational Structure

### LESSON OVERVIEW

This lesson shows you how to create and copy objects and assign them to the organizational structure.

### Business Example

You need to maintain the organizational structure by adding and assigning objects. For this reason, you require the following knowledge:

- An understanding of how to create and copy objects
- An understanding of how to assign objects to the organizational structure

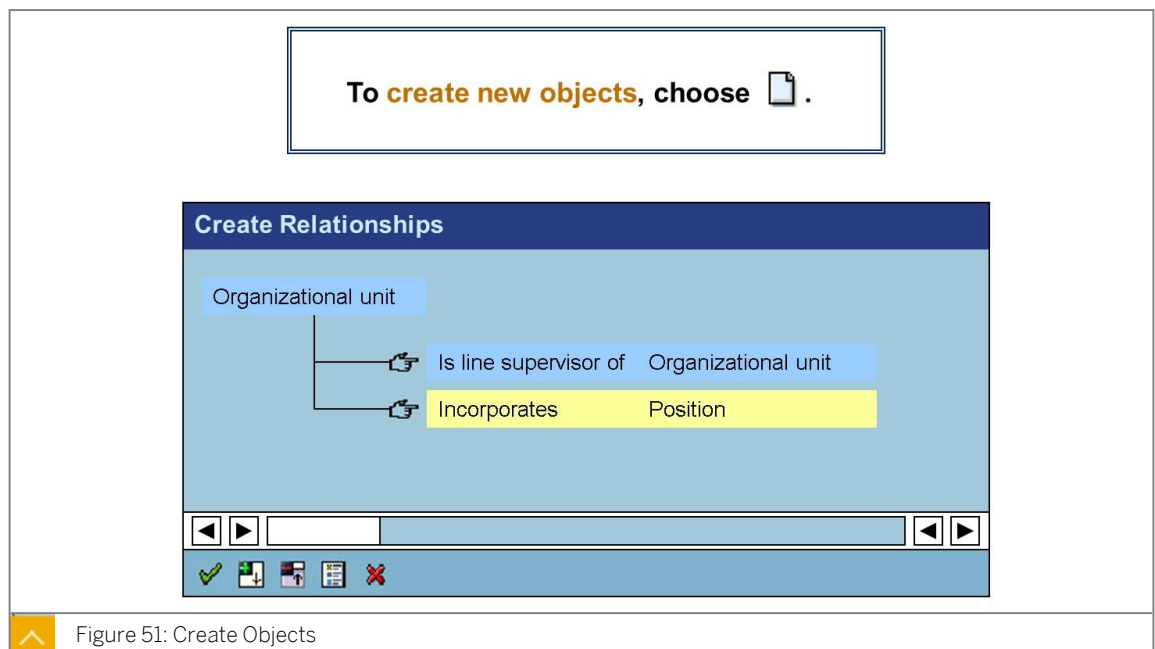


### LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Modify the organizational structure by creating organizational objects
- Assign objects to the existing organizational structure

### Objects in the Organizational Structure



You can choose one of the object types to be created in the current display.

The objects you can create depend on the selected object and the evaluation path used in the overview area.

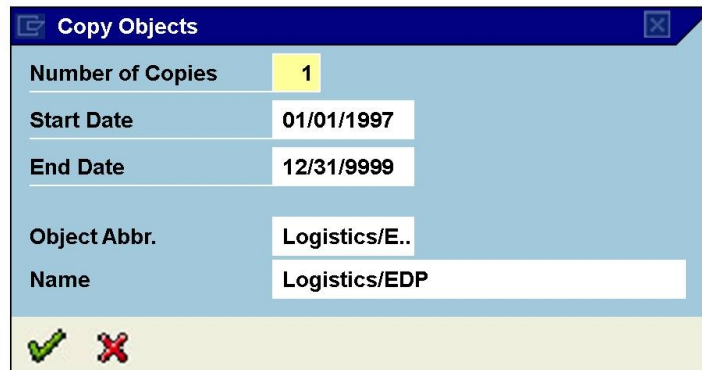


If necessary, choose the *Display Evaluation Path* icon to check the assignments you can make.

## Copy Objects



Use  to create a new object by **copying** an existing one.



Number of Copies	1
Start Date	01/01/1997
End Date	12/31/9999
Object Abbr.	Logistics/E..
Name	Logistics/EDP

Figure 52: Copy Objects


You can create a new object by copying an existing object. When you do this, the properties of the object are copied. By making an entry in table T77ITEX, *Hierarchy Framework: Copy Object: Exclude Infotype*, you can exclude infotypes from the copying process. As a customer, you can exclude further infotypes from this process in table T77ITEX\_C.

When you copy objects, you can enter the number of copies and give them names. You can exclude selected infotypes from the copying process in Customizing.



## Object Assignment



You can **assign** objects by dragging and dropping or by using the  icon.

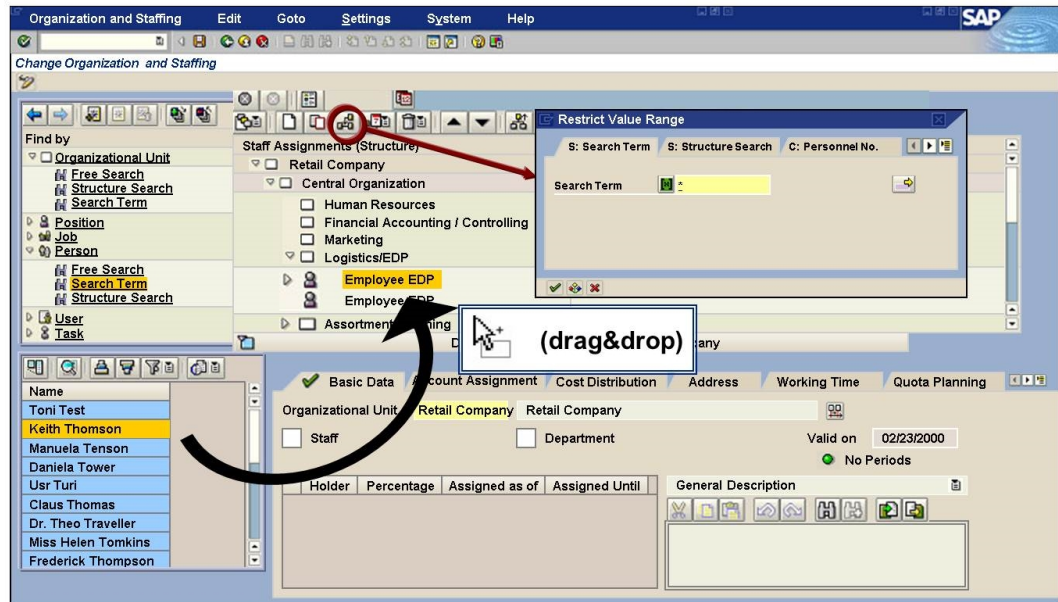


Figure 53: Assigning Objects

### The following tasks can be performed for objects:

- Newly assigned, if they are not yet assigned
- Moved to end an object's current assignment in a structure and create a new assignment within the same structure
- Repositioned within a hierarchy level in a structure

The object you can assign, move, or reposition depends on the current evaluation path in the overview area.



## LESSON SUMMARY

You should now be able to:

- Modify the organizational structure by creating organizational objects
- Assign objects to the existing organizational structure







# Learning Assessment

1. The date and preview periods control which objects are displayed in the structure based on their start and end dates.

*Determine whether this statement is true or false.*

☐ True

☐ False

2. When you activate the Query Time Period/Create Several Objects setting in the menu bar, you can create a \_\_\_\_\_ for the user.

*Choose the correct answer.*

☐ A date query

☐ B selection query

☐ C evaluation query

3. In the selection area, you can select an object that was obtained through a search, and use it in the overview or detail areas.

*Determine whether this statement is true or false.*

☐ True

☐ False

4. The Undo or Redo function allows you to undo or redo the changes made to the \_\_\_\_\_ interface as long as the data has not been saved.

*Choose the correct answer.*

☐ A Organization and Staffing

☐ B Simple Maintenance

☐ C Infotype Maintenance



5. The object manager consists of a \_\_\_\_\_ and a \_\_\_\_\_ area.

*Choose the correct answers.*

- ☐ A Selection
- ☐ B Work
- ☐ C Overview
- ☐ D Search

6. Objects can be moved, assigned, or repositioned.

*Determine whether this statement is true or false.*

- ☐ True
- ☐ False

7. You can create a new object by copying an object that already exists.

*Determine whether this statement is true or false.*

- ☐ True
- ☐ False

8. Which objects you can create depends on the \_\_\_\_\_ and \_\_\_\_\_.

*Choose the correct answers.*

- ☐ A selected object
- ☐ B assignments
- ☐ C evaluation path
- ☐ D selected infotypes

9. Objects can be repositioned within a hierarchy level in a structure.

*Determine whether this statement is true or false.*

- ☐ True
- ☐ False



### Learning Assessment - Answers

1. The date and preview periods control which objects are displayed in the structure based on their start and end dates.

*Determine whether this statement is true or false.*

☒ True

☐ False

2. When you activate the Query Time Period/Create Several Objects setting in the menu bar, you can create a \_\_\_\_\_ for the user.

*Choose the correct answer.*

☒ A date query

☐ B selection query

☐ C evaluation query

3. In the selection area, you can select an object that was obtained through a search, and use it in the overview or detail areas.

*Determine whether this statement is true or false.*

☒ True

☐ False

4. The Undo or Redo function allows you to undo or redo the changes made to the \_\_\_\_\_ interface as long as the data has not been saved.

*Choose the correct answer.*

☒ A Organization and Staffing

☐ B Simple Maintenance

☐ C Infotype Maintenance



5. The object manager consists of a \_\_\_\_\_ and a \_\_\_\_\_ area.

*Choose the correct answers.*

☒ A Selection

☐ B Work

☐ C Overview

☒ D Search

6. Objects can be moved, assigned, or repositioned.

*Determine whether this statement is true or false.*

☒ True

☐ False

7. You can create a new object by copying an object that already exists.

*Determine whether this statement is true or false.*

☒ True

☐ False

8. Which objects you can create depends on the \_\_\_\_\_ and \_\_\_\_\_.

*Choose the correct answers.*

☒ A selected object

☐ B assignments

☒ C evaluation path

☐ D selected infotypes

9. Objects can be repositioned within a hierarchy level in a structure.

*Determine whether this statement is true or false.*

☒ True

☐ False



# UNIT 4

# Expert Mode in Organizational Management

## Lesson 1

Maintaining Infotypes

73

### UNIT OBJECTIVES

- Maintain infotypes to modify the setup of the organizational structure using the Expert mode interface
- Evaluate the functions for maintaining the organizational structure
- Maintain organizational management infotypes







## Maintaining Infotypes

### LESSON OVERVIEW

This lesson outlines how to maintain infotypes in expert mode and how to use the main Organizational Management (OM) infotypes.

### Business Example

As a member of the project team implementing HCM Organizational Management, you are responsible for the maintenance of information for individual objects. You plan to maintain infotypes and modify the setup of the organizational structure using the Expert Mode interface. For this reason, you require the following knowledge:

- An understanding of how to modify the setup of the organizational structure using expert mode



### LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Maintain infotypes to modify the setup of the organizational structure using the Expert mode interface
- Evaluate the functions for maintaining the organizational structure
- Maintain organizational management infotypes



## Infotype Maintenance



Figure 54: Infotype Maintenance

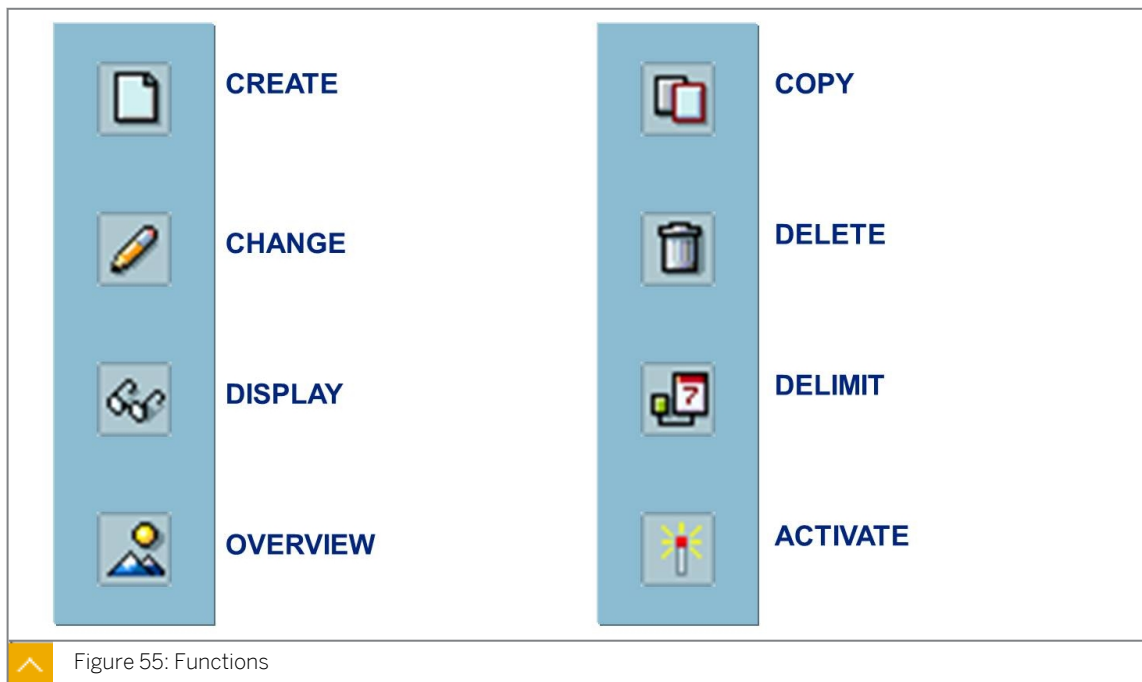
You can access infotypes directly from object maintenance. As part of object maintenance, you can maintain infotype records with different statuses.

The following table shows the fields used to maintain infotypes and their description:

Field	Description
Plan Version	Ensures that you are working on the correct plan version at all times
Organizational Unit	Displays the object ID and enables you to find the object you want to maintain
Abbreviation	Displays the abbreviation to ensure that the right object is being edited
Validity Period	Specifies the start and end dates of the period during which the object exists in the current plan version
Infotype	Helps you select the infotype you want to maintain
Status	Allows you to select the infotypes you want to maintain by using the status tab pages
Display Available Infotypes	Shows the infotype records that exist for the object selected (indicated by a green check mark) depending on the period



## Functions



The following table describes functions of the various icons:

Icon	Function
Create	Creates an infotype record
Copy	Copies data from an existing record
Change	Corrects or changes data for an infotype record
Delete	Deletes an infotype record
Display	Displays a single infotype record
Delimit	Delimits an infotype record
Overview	Displays all records for an infotype
Activate	Changes the status of an Infotype to <i>Active</i>



## Delimitation and Deletion





Delimit	Delete
 <p><b>After the specified period, the information is no longer valid.</b></p> <p><b>History is maintained.</b></p> <p><b>Examples:</b>            A department is closed.            A position is canceled.</p>	 <p><b>Incorrect entries were made, either inadvertently or when testing plan versions.</b></p> <p><b>History is not maintained.</b></p> <p><b>Examples:</b>            Too many positions were created for a job.            A new department was planned but then canceled.</p>

Figure 56: Delimit and Delete

When you delete or delimit an object, all of its infotypes are also deleted or delimited.

## Objects

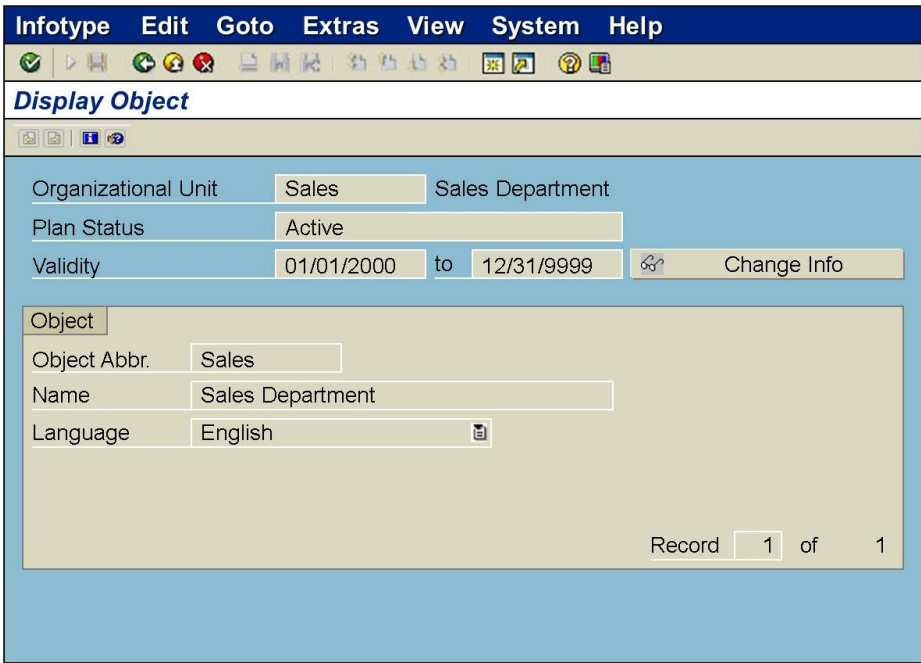



Figure 57: Object

The *Object* infotype (IT1000) is a special infotype. Infotypes usually describe an object's characteristics.



**The Object infotype has the following functions:**

- It allows you to create new objects, for example, organizational units, jobs, and positions.
- It determines the lifecycle of all other infotypes created for the object.
- It defines the existence of an organizational object.

**To create new objects, you must maintain the following data:**

- Validity period of the object
- Status
- Object abbreviation (12 characters)
- Name (40 characters)

After you create an object by using this infotype, you can maintain the properties of the object by using the other available infotypes.

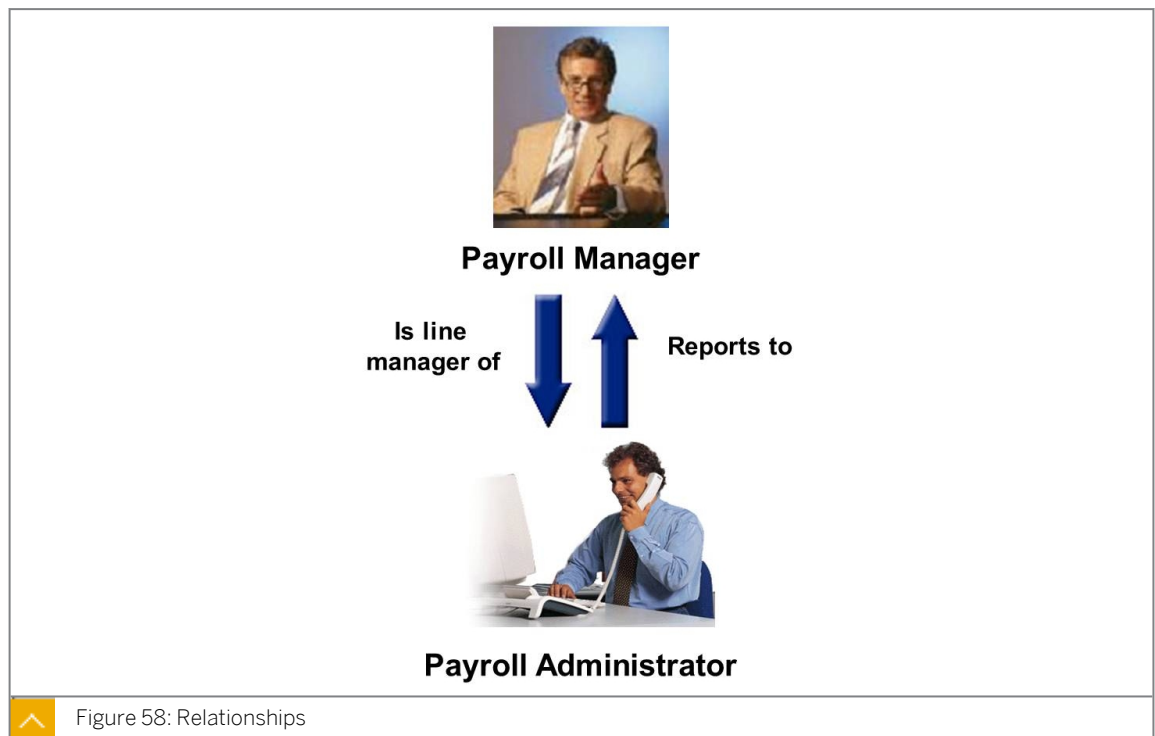
**Relationships**

Figure 58: Relationships

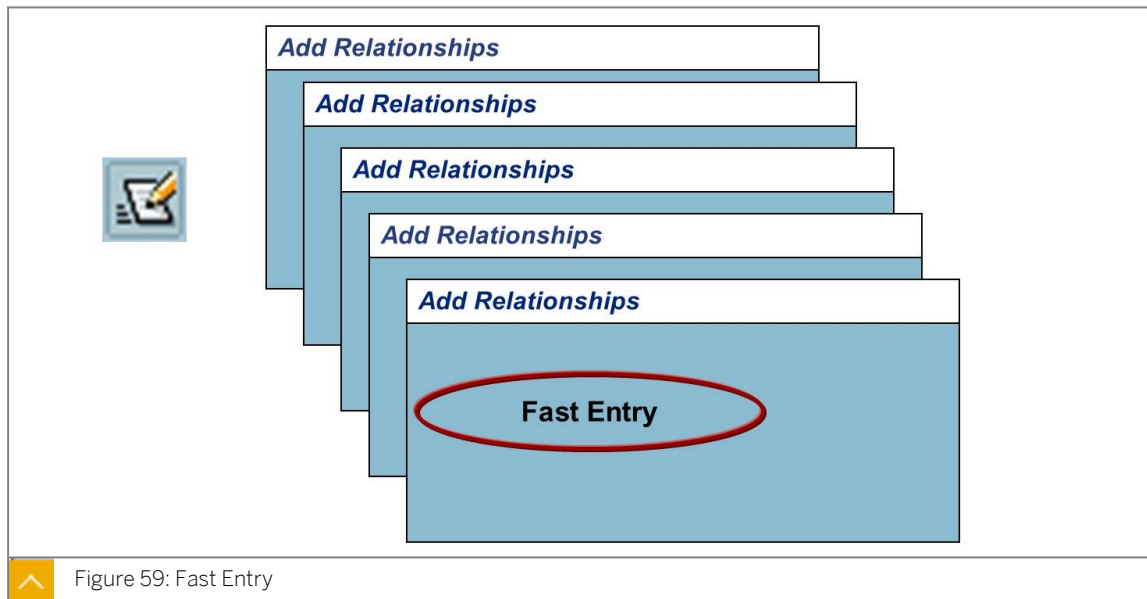
The *Relationships* infotype (IT1001) enables you to define relationships between various objects. You create relationship records manually when you work in infotype maintenance. However, the system creates certain relationships automatically for the *Organization and Staffing*, *Simple Maintenance*, and *General Structure* interfaces.

There are many different relationship types that you can create between object types. Each individual relationship represents a subtype of the *Relationships* infotype. Not all relationships apply to every object.

Certain relationship types allow you to store additional information for the object, such as a weighting percentage or a priority. When you create a relationship, the inverse relationship is usually created by the system.



## Fast Entry



Fast entry allows you to create many instances of the same infotype record quickly. You can use this function to create the same infotype record, such as a Relationships infotype record, for many different objects.

Fast entry allows you to stay inside the respective infotype window, instead of entering and exiting again. This function saves you time and is available for most infotypes.

## Description Infotype



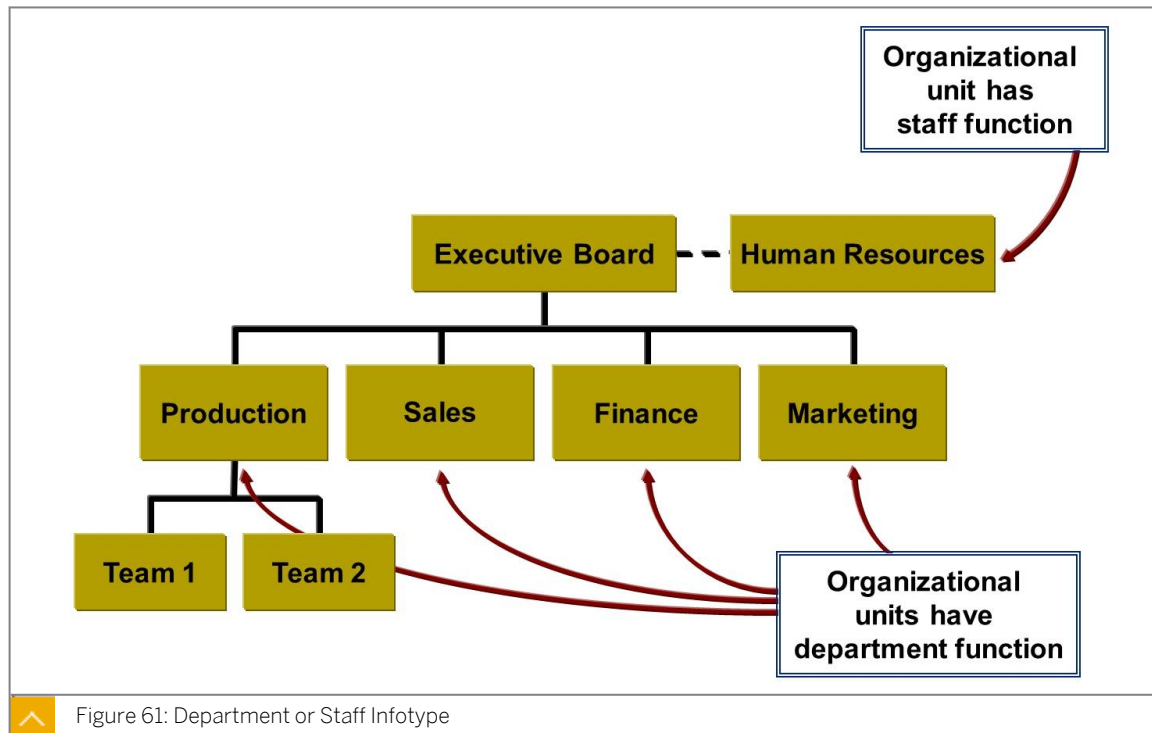
Figure 60: Description Infotype

The *Description* infotype (IT1002) enables you to enter long text descriptions for objects. The infotype subtype specifies various types of descriptions. For example, you may want to explain an organizational unit's purpose or responsibilities.

Report RHTRANS0 enables you to obtain a list of language-dependent infotypes in Organizational Management (OM), and translate them into different languages.



## Department or Staff Infotype



The *Department or Staff* infotype (IT1003) is used for organizational units and positions only.

### The Department or Staff infotype has the following functions:

- The staff indicator (possible for positions and organizational units)

The staff indicator shows that an organizational unit or a position is not part of the reporting structure of a company, but reports directly to an organizational unit within the structure of the company. For example, the Human Resources department is not part of the company's reporting structure. It reports directly to the Executive Board as a staff department. Many companies use the staff indicator to flag organizational units that have an advisory or consulting function.

The staff indicator is represented graphically.

- The department indicator (only relevant for organizational units)

It can be necessary to flag an organizational unit as a department when integration between OM and Personnel Administration (PA) is active. If you need to define organizational units in more detail (for example, at team level) in OM than is necessary in PA, you have to use the department indicator.

The *Department or Staff* infotype allows you to specify the organizational unit entered for the employee in the *Organizational Assignment* (IT0001) infotype. After the infotype is activated in Customizing, the system reads the organizational structure. It starts reading from the relevant employee, until it finds an organizational unit flagged with the department indicator.

If you want to use the department indicator, you must set the switch PPABT PPABT in table T77S0 to 1.



## Planned Compensation Infotype

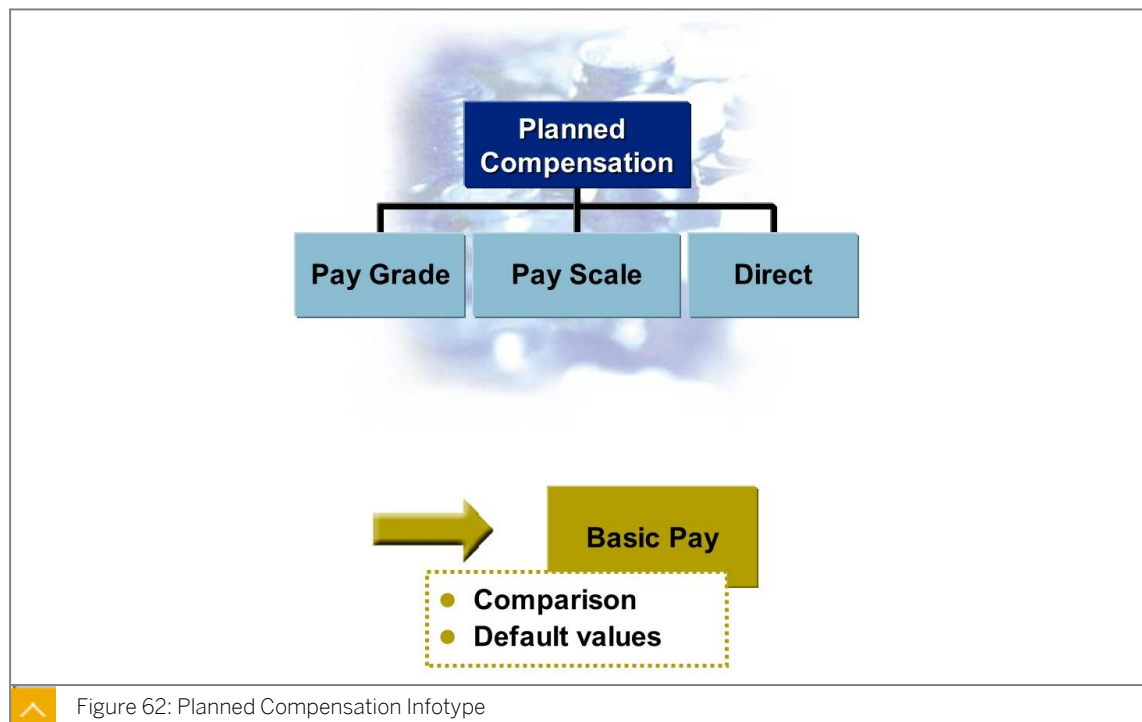


Figure 62: Planned Compensation Infotype

The *Planned Compensation* infotype (IT1005) allows you to define the planned compensation for a given position, job, or work center. You can also specify salaries or wages in this infotype. The information entered in this infotype can be used as default values for the *Basic Pay* infotype in PA.

This infotype is primarily used in Compensation Management for storing person-dependent compensation data that can then be compared with real compensation data. This enables the company to create a compensation strategy. With SAP ERP, you can also use the infotype for Personnel Cost Planning.

If integration with master data is active, you can use the *Planned Compensation* infotype to provide default values for the *Basic Pay* infotype in master data. These default values are based on the salary or pay scale data saved for the employee's position or the descriptive job.

### The Planned Compensation infotype has the following attributes (types of planned compensation):

- Salary

You can store information about the planned classification of this position and job in your company's salary structure (table T710).

- Pay scale

You can store information about the planned classification of this position and job for the pay scale structure (table T510) of your company.

- Direct

Companies that do not have a salary structure or a pay scale structure to enable them to use the report Compare Actual Base Salary to Planned Compensation (report RHCMPCOMPARE\_ACTUAL\_PLANNED) can use this attribute.



## Vacancy Infotype



**The Vacancy infotype enables you to store position vacancies.**



Figure 63: Vacancy Infotype

The *Vacancy* infotype (IT1007) can be created for a position that is occupied or unoccupied. You can flag an occupied position as vacant if you know that the position holder will be leaving the position at some point in the future (as a result of a promotion or transfer, for example).

Positions cannot be flagged simultaneously as vacant and obsolete. If a vacant position is flagged as obsolete, then the vacancy is delimited at the start of the validity of the obsolete indicator (minus one day).

Other components can flag a position as vacant. For example, if you use Personnel Cost Planning, the system can take vacancies into account when calculating cost projections.

It is not mandatory to maintain the *Vacancy* infotype. If your company does not distinguish between occupied and unoccupied positions (that is, you consider all unoccupied positions to be vacant) then you can make the necessary settings in Customizing.

## Obsolete Infotype



Position	Admin. Assistant	Admin. Assistant
Plan Status	Active	
Validity	01/01/2000	to 12/31/9999
Obsolete	<input type="checkbox"/> Obsolete	

**A 008**



**In Customizing, you can specify how the system is to respond if an obsolete position is to be occupied.**



Figure 64: Obsolete Infotype



The *Obsolete* infotype (IT1014) is used to flag positions that are no longer needed (for example, due to reorganization), but are still occupied.

As soon as the position holder leaves the position (for example, due to a transfer), a dialog box automatically appears in which you can delimit the position.

Positions flagged as obsolete cannot be set to vacant.

In Customizing for the Holder relationship (A or B008), you specify whether the *Obsolete* infotype is to be used and how the system reacts (error, warning, or information message) if the user attempts to assign a person to an obsolete position.

### Account Assignment Features Infotype



Org. Unit	Sales	Sales Department
Plan Status	Active	
Validity	01/01/1999 to 12/31/9999	Change Info

Account Assignment Features		
Company Code	CABB	Training
Business Area	Administration / Other	
Personnel Area	CABB	Frankfurt
Personnel Subarea	0003	Head Office
CO Area	1000	CO Universal

Customizing	
PPOM	INHS
X	Positions inherit account assignment features

Figure 65: Account Assignment Features Infotype

The *Account Assignment Features* infotype (IT1008) can be created for organizational units and positions.

This infotype enables you to create relevant default values for PA. When the values are entered, they are checked against values in Cost Accounting.

This infotype stores default values relevant to the PA component (if integration is active), and the cost center assignment of organizational units and positions.

If integration with PA is active, the *Account Assignment Features* infotype provides default values for the classification of employees in the enterprise structure of the company. These values may be personnel areas, personnel subareas, or business areas. If the data you entered differs from the default values, the system displays a warning message.

Subordinate organizational units and positions inherit the *Account Assignment Features* infotype.



Hint:

A personnel area and cost center must belong to the same company code before an employee can be assigned both.



## Employee Group/Subgroup Infotype



Position	Admin. Assistant	Admin. Assistant
Plan Status	Active	
Validity	01/01/2000	to 12/31/9999  Change Info
Employee Group	1	
EE Subgroup	X7	

Figure 66: Employee Group/Subgroup Infotype

The *Employee Group/ Subgroup* infotype (IT1013) enables you to assign a position to an employee group and subgroup.

When a position is occupied by an employee, the system proposes an employee group and employee subgroup, if integration with PA is active. If you enter a different employee group or subgroup, a warning message is displayed. Users can overwrite these values at any time.

Assigning a position to an employee group or subgroup also allows the system to determine the work schedule group in OM and thereby determine the relevant working time (IT1011) for the position.

Employee groups and subgroups feature frequently in PA and Payroll.

## Work Schedule Infotype

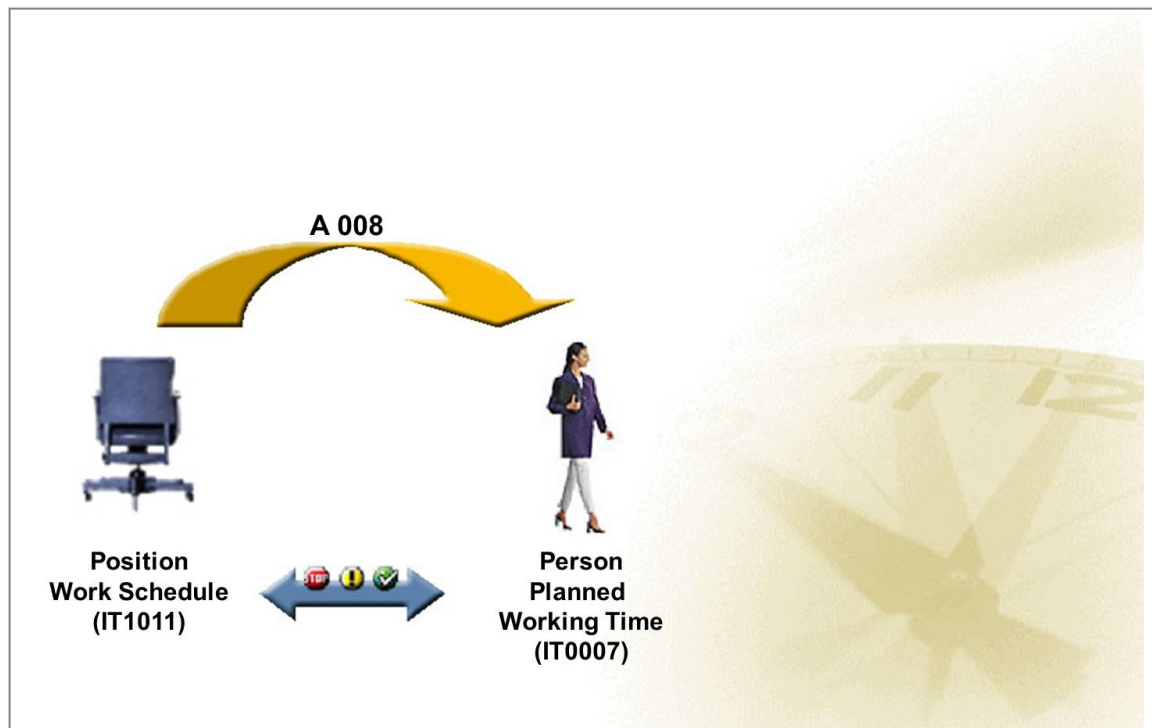


Figure 67: Work Schedule Infotype



The *Work Schedule* infotype (IT1011) enables you to define a work schedule, such as the average number of hours to be worked, for organizational units, work centers, or positions.

In Customizing, you can create a standard working time (hours per day, per week, per month, or per year) that is valid company-wide. You can assign different work schedules for certain sections of the company by using the *Work Schedule* infotype.

The working times stored in OM are needed for comparison with the values stored for the person in the *Planned Working Time* infotype (IT0007). You can activate and configure this comparison in Customizing for the relationship attributes of the Holder Relationship (A/B008).

Report RHSBES10 compares the working time stored in the *Work Schedule* infotype (IT1011) with the working times that are actually stored for the person in the *Planned Working Time* infotype (IT0007).



**Hint:**

You can store a company-wide work schedule for your company's root organizational unit in the *Work Schedule* infotype. This is necessary to retain historical data that can be evaluated if changes occur. If the company-wide work schedule is defined in Customizing only, the history of changes in the organizational plan is not stored.

## Working Time Customizing

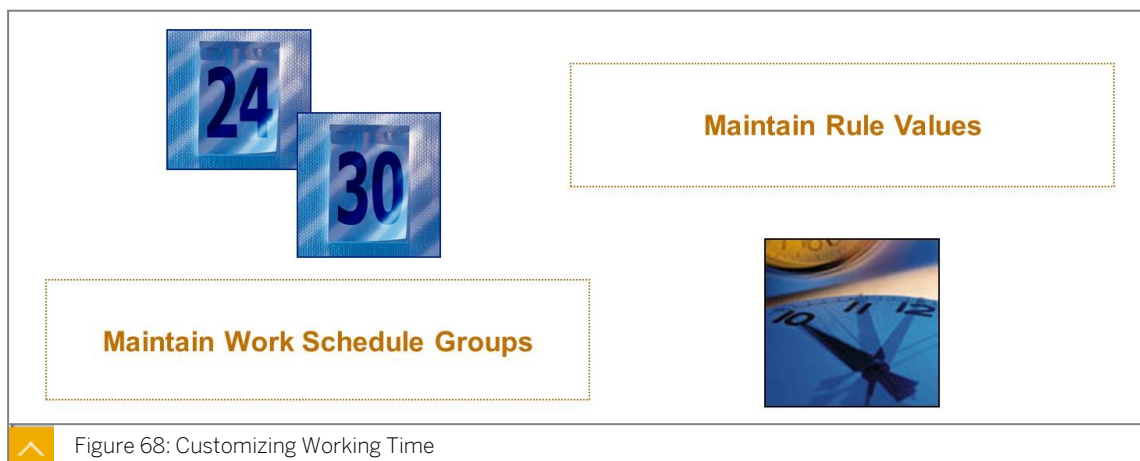


Figure 68: Customizing Working Time

### When you define the work schedule, you can make the following settings:

- **Maintain rule values**  
Define a rule value for the average work schedule that applies in your enterprise.
- **Maintain work schedule groups**  
Specify the employee groups and subgroups assigned to a specific work schedule group.

If you do not want to use rule values to depict working time groups, you can also maintain working time groups in Customizing. This helps you to specify a working time for individual positions or organizational units and their subordinate organizational objects.

Depending on the employee group or subgroup maintained in *Employee Group/Subgroup* infotype (IT1013) or for the descriptive job, this grouping enables you to specify the positions that receive a particular working time. You can maintain this working time for the relevant



organizational unit in the *Work Schedule* infotype (IT1011) in relation to the working time groups. Maintaining the working time allows you to store different working times for all the appropriate positions belonging to this organizational unit.

Maintain the *Work Schedule* infotype for the organizational objects in your organization (or at least the root organizational unit). This is the only way to retain a history of changes to working times.

### Cost Distribution Infotype



**Change Cost Distribution**

Position: Market. Manag.  
 Plan Status: Active  
 Validity: 01.01.2000 to 12.31.9999 [Change Info](#)

Cost Distribution

Master Cost Center: 1000

COAr	Cost Ctr	Order	WBS Element	Name	Pct.
1000	3200			Marketing	30

Entry 1 of 1      Entry 1 / 1

**30% Cost center Marketing**  
**70% = Master cost center Sales**

Figure 69: Cost Distribution Infotype

The *Cost Distribution* (IT1018) infotype allows organizational units and positions to be assigned to both the master cost center and additional cost centers, orders, or WBS elements. You must enter a cost unit and a percentage for cost distribution. The percentage assignment to the master cost center is based on the difference (up to 100%).

An employee inherits the cost distribution assigned to his or her position or organizational unit.

Payroll can also use the Cost Distribution infotype in OM. However, if integration between OM and PA is active, and the employee has an active PA Cost Distribution infotype (IT0027), the PA infotype will take precedence.

### Default Values for OM Infotypes



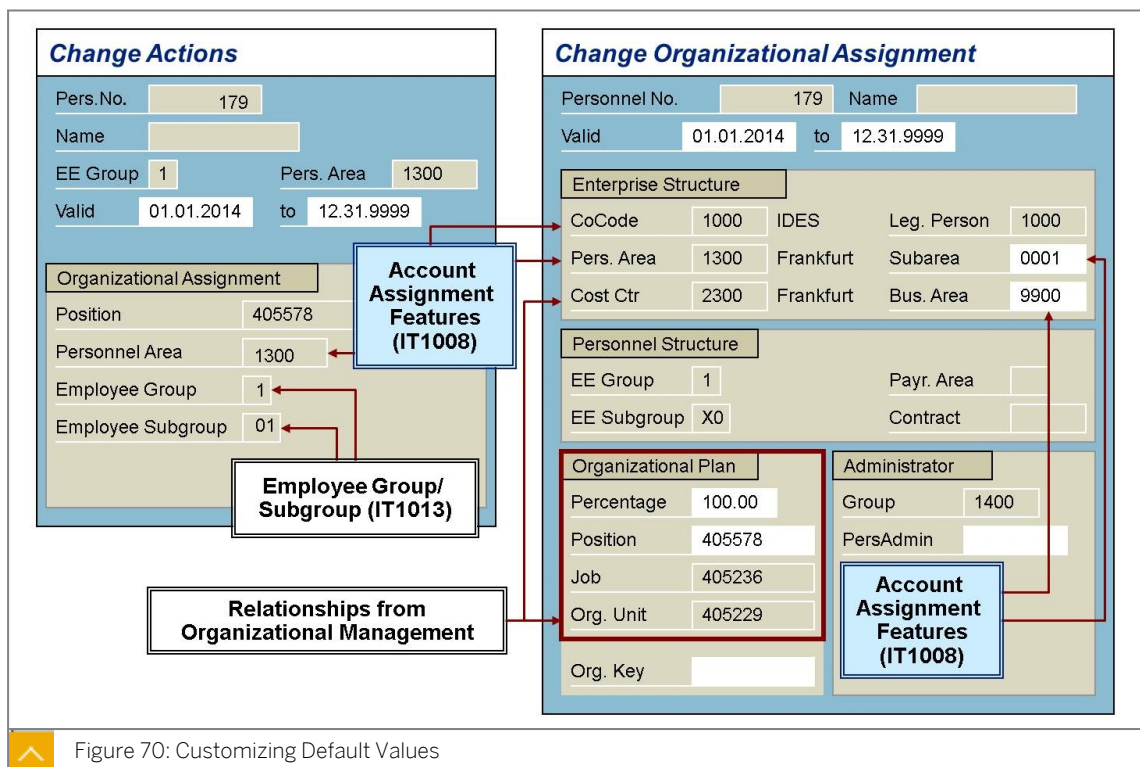


Figure 70: Customizing Default Values

When you enter the details of a new employee in the HR master data, you can enter the position in the *Actions* infotype. Based on the position you enter, the values stored in OM appear in the fields in the *Actions* infotype (IT0000).

When you assign a value for the personnel area of a position at organizational unit level, the same value is set as the default value for the position in the hierarchy of the organizational unit.

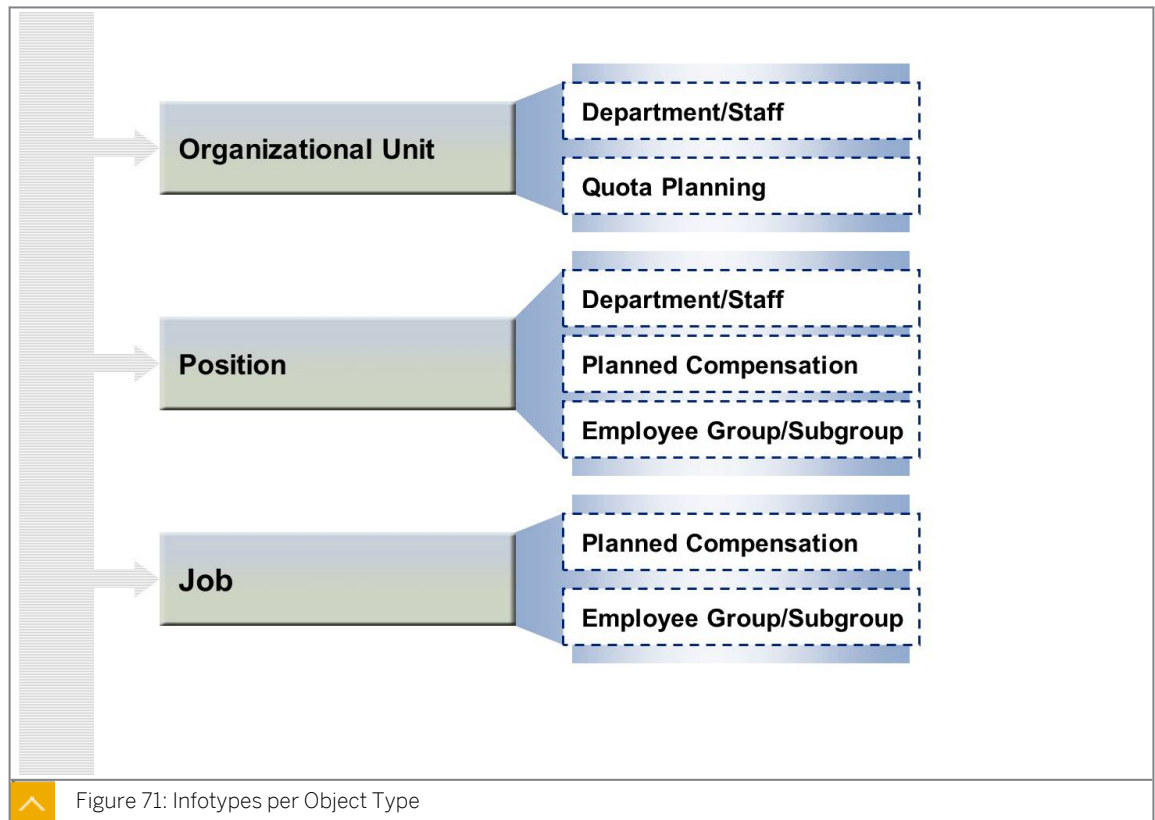
The default values for the employee group and subgroup are based on the *Employee Group/Subgroup* infotype.

Default values can also appear in the *Organizational Assignment* infotype. The default values for the business area and personnel subarea come from the *Account Assignment Features* infotype for the position (or organizational unit) concerned.

All values in the organizational plan area, except the organizational key, are determined directly through the assigned position and transferred to the infotype. The same also applies to the assigned cost center. The cost center originates either from the relationship of the organizational unit or position, or from the inheritance logic in OM for cost centers.



## Infotypes per Object Type



Some infotypes are relevant only for certain object types. The *Planned Compensation* infotype (IT1005), for example, is not assigned to an organizational unit. Table T777I displays the valid infotypes per object and their time constraints.

## OM Tools

Tools are used to execute various tasks.

**The main types of tools are as follows:**

- Object tools

**Object tools enable you to perform the following tasks:**

- Execute actions
- Copy objects
- Copy objects by using list
- Copy structures
- Delimit objects
- Modify new end date
- Change status

To access the object tools, go to the *SAP Easy Access* screen and choose *Human Resources* → *Organizational Management* → *Tools* → *Objects*.



- Infotype Tools

**Infotype tools enable you to perform the following tasks:**

- Delimit infotype
- Modify new end date
- Modify new start date
- Translate language-dependent texts

To access the infotype tools, go to the *SAP Easy Access* screen and choose *Human Resources* → *Organizational Management* → *Tools* → *Infotype*.

Comprehensive documentation is available on the screen for the tasks that the object and infotype tools allow you to perform.

## OM Actions

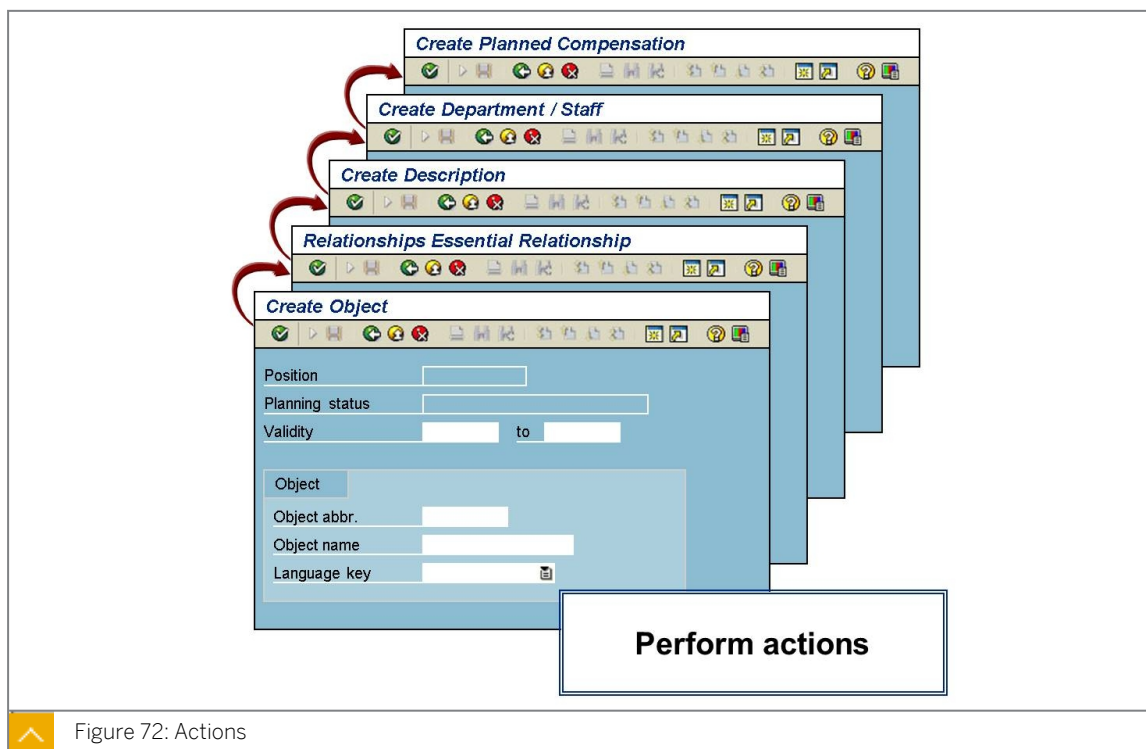


Figure 72: Actions

You can create objects by using actions. An action is a series of infotypes presented for editing in a specific order or sequence.

You can determine the infotypes and the sequence in Customizing.

**For example, the standard action, create a position, consists of the following infotypes:**

- *Object*
- *Relationship to Organizational Unit*
- *Relationship to Describing Job*
- *Description*
- *Department or Staff*



## Actions Customizing



Action	Info	Action Name
A		Create work center
B		Create training program
C		Create job
S		Create position

Action	Action Name	FNo.	Plan V.	OT	Infot	Subtype	Plan Status	Variation
S	Create position	1	**		1000			
S	Create position	20	**	S	1001	A002		S
S	Create position	30	**	S	1002	0001		
S	Create position	40	**	S	1003			
S	Create position	50	**	S	1005			
S	Create position	60	**	S	1010			
S	Create position	80	**	S	1001	B007		C
S	Create position	100	**	S	1001	A002		S

Figure 73: Customizing Actions

When you carry out an action, the user is automatically offered the relevant infotypes one after another. When you customize an action, you determine the infotypes and the sequence in which they appear.

**Each substep of an action involves the processing of an individual infotype. You can assign the following attributes to each substep of an action:**

- A plan version
- An object type
- An infotype or a subtype
- A status



Hint:

When you define an action, make sure that you assign infotypes in a logical order. The Object infotype must always be edited first and have 01 as its line number.

Each action can be defined only for one object type.



## LESSON SUMMARY

You should now be able to:

- Maintain infotypes to modify the setup of the organizational structure using the Expert mode interface
- Evaluate the functions for maintaining the organizational structure
- Maintain organizational management infotypes







### Learning Assessment

1. Fast entry allows you to create instances of the same infotype record quickly.

*Determine whether this statement is true or false.*

☐ True

☐ False

2. The Department or Staff infotype is used for organizational units and positions only.

*Determine whether this statement is true or false.*

☐ True

☐ False

3. Which of the following infotypes are the main properties of organizational objects?

*Choose the correct answers.*

☐ A Account Assignment Features (IT1008)

☐ B Relationships (IT1001)

☐ C Planned Compensation (IT1005)

☐ D Quota Planning (IT1019)

☐ E Object (IT1000)



4. Which of the following statements about infotypes is true?

*Choose the correct answers.*

- ☐ **A** The Work Schedule infotype delivers default values for the Planned Working Time infotype in Personnel Administration.
- ☐ **B** If specified in Customizing, the Work Schedule infotype can influence the calculation of full-time equivalents (FTE) for the positions of the organizational unit for which it is maintained.
- ☐ **C** The Employee Group/ Subgroup infotype delivers default values for Personnel Administration when a position is reoccupied for which the infotype is maintained.
- ☐ **D** The Employee Group/Subgroup acts as a grouping characteristic for positions when maintaining different work schedules for the different valuation of FTEs.
- ☐ **E** A position can be occupied and obsolete at the same time.



### Learning Assessment - Answers

1. Fast entry allows you to create instances of the same infotype record quickly.

*Determine whether this statement is true or false.*

☒ True

☐ False

2. The Department or Staff infotype is used for organizational units and positions only.

*Determine whether this statement is true or false.*

☒ True

☐ False

3. Which of the following infotypes are the main properties of organizational objects?

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☐ A Account Assignment Features (IT1008)

☒ B Relationships (IT1001)

☐ C Planned Compensation (IT1005)

☐ D Quota Planning (IT1019)

☒ E Object (IT1000)



4. Which of the following statements about infotypes is true?

*Choose the correct answers.*

- ☐ A The Work Schedule infotype delivers default values for the Planned Working Time infotype in Personnel Administration.
- ☒ B If specified in Customizing, the Work Schedule infotype can influence the calculation of full-time equivalents (FTE) for the positions of the organizational unit for which it is maintained.
- ☒ C The Employee Group/ Subgroup infotype delivers default values for Personnel Administration when a position is reoccupied for which the infotype is maintained.
- ☒ D The Employee Group/Subgroup acts as a grouping characteristic for positions when maintaining different work schedules for the different valuation of FTEs.
- ☐ E A position can be occupied and obsolete at the same time.



## UNIT 5

# Simple Maintenance in Organizational Management

### Lesson 1

Maintaining Organizational Plans Using Simple Maintenance

97

#### UNIT OBJECTIVES

- Set up an organizational structure using Simple Maintenance







## Maintaining Organizational Plans Using Simple Maintenance

### LESSON OVERVIEW

This lesson explains how to create and maintain the organizational structure by using the *Simple Maintenance* interface (PPOM\_OLD).

### Business Example

You want to add a new branch to your company in Organizational Management (OM). To do so, you need to make changes to the organizational plan by using the *Simple Maintenance* interface. For this reason, you require the following knowledge:

- An understanding of how to use the *Simple Maintenance* interface to set up the organizational structure



### LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Set up an organizational structure using Simple Maintenance

### Simple Maintenance

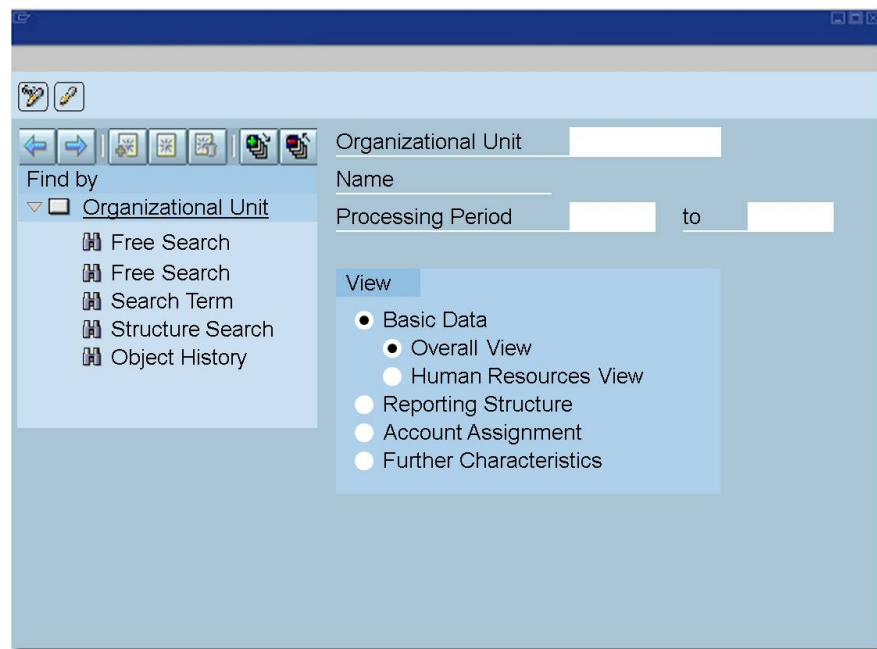


Figure 74: Simple Maintenance



The *Simple Maintenance* user interface is a tool that allows users to quickly depict the organizational plan. The *Simple Maintenance* interface enables users to create the organizational plan and to maintain large volumes of data easily. This interface requires considerably less system resources than the more modern *Organization and Staffing* user interface.

Although *Simple Maintenance* is available to all users of OM, it was originally designed to meet the needs of *SAP Business Workflow* users. *SAP Business Workflow* users do not need all the functions available in OM. For this reason, the original concept behind *Simple Maintenance* was to provide a tool that allows users to build and maintain organizational plans quickly and easily.



**Note:**

To edit the individual organizational objects in more detail, you can use the *Organization and Staffing* and *Expert Mode (Infotype Maintenance)* interfaces with which you are already familiar.

## Standard Evaluation Paths

- Organizational Structure
- Staff Assignments
- Task Profile

On the *Simple Maintenance* user interface, three main evaluation paths are used. Each evaluation path includes certain maintenance functions, depending on whether you want to maintain organizational structures, staff assignments, or task profiles.

When you access the *Simple Maintenance* interface, you need to specify which particular evaluation path you need to create a structure. However, you can change this evaluation path after you start using OM.

### The evaluation paths offer you the following basic structures:

- Change Organizational Structure

The *Change Organizational Structure* evaluation path is the initial screen in *Simple Maintenance*. You begin all activities from this screen. From here, you can switch to the other screens in *Simple Maintenance*, as required.

The *Change Organizational Structure* view allows you to create and maintain the organizational structure for your organizational plan.

- Change Staff Assignments

The *Change Staff Assignments* evaluation path allows you to edit the staff assignments required for an organizational plan.

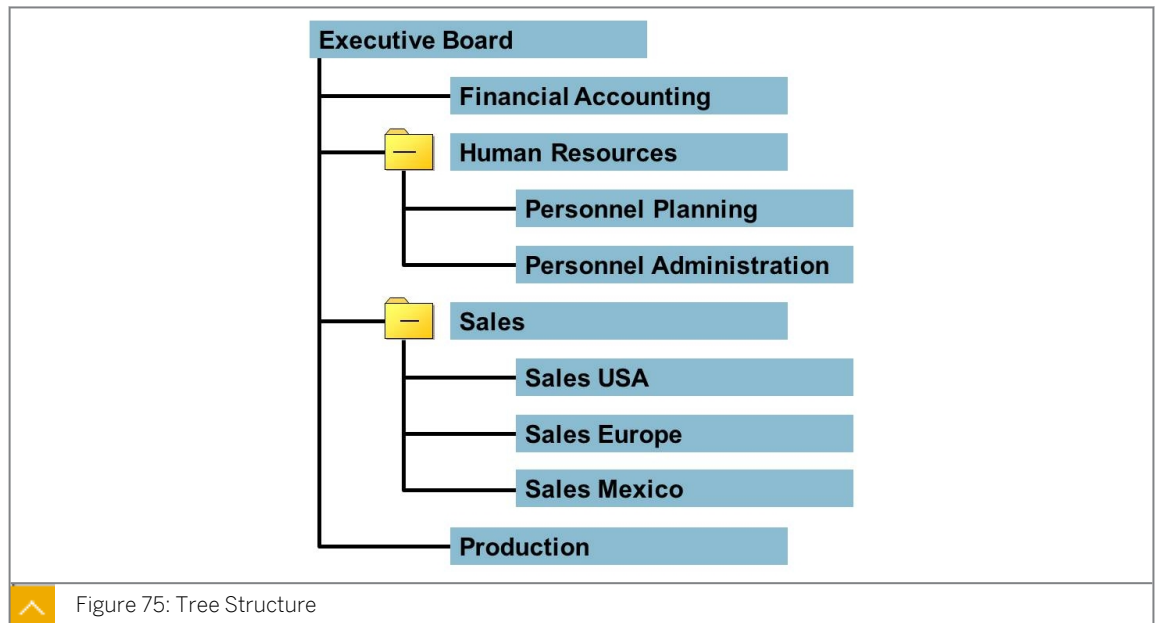
When you create positions in the *Change Staff Assignments* view, you automatically create the relationships that link positions with organizational units. If you create positions by copying existing ones, the system automatically creates the relationship records that link positions and jobs.

- Change Task Profile

The *Change Task Profile* evaluation path allows you to create, maintain, and display task profiles for organizational units, jobs, positions, and users.



## Tree Structure



*Simple Maintenance* uses a tree structure that enables you to create your organizational plan. The different elements in an organizational plan are represented graphically by a tree structure.

The different branches of a tree structure illustrate the relationships between different objects. You can also use the tree structure to create and maintain organizational structures quickly and easily.

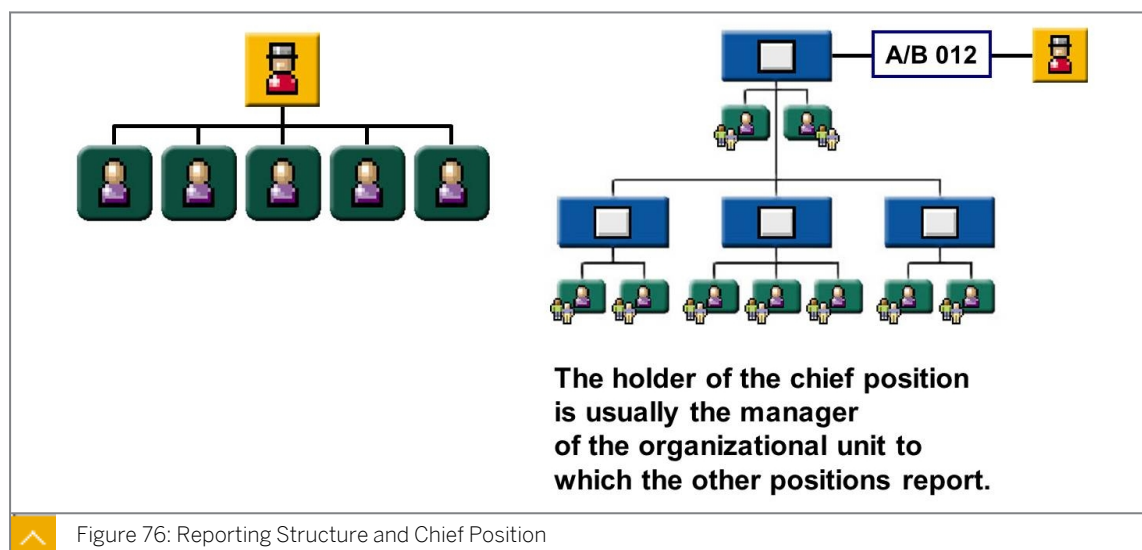
### The tree structure offers the following advantages for maintaining the organizational plan:

- You can visualize relationships between different objects.
- You can use the system to create certain relationship records based on where you place objects within the tree structure.
- You can move and reassign objects within the structure.
- You can adjust the structure display so that it shows different types of information.

For example, you can set the view so that it displays validity periods for objects or relationship records.



## Reporting Structure and Chief Position

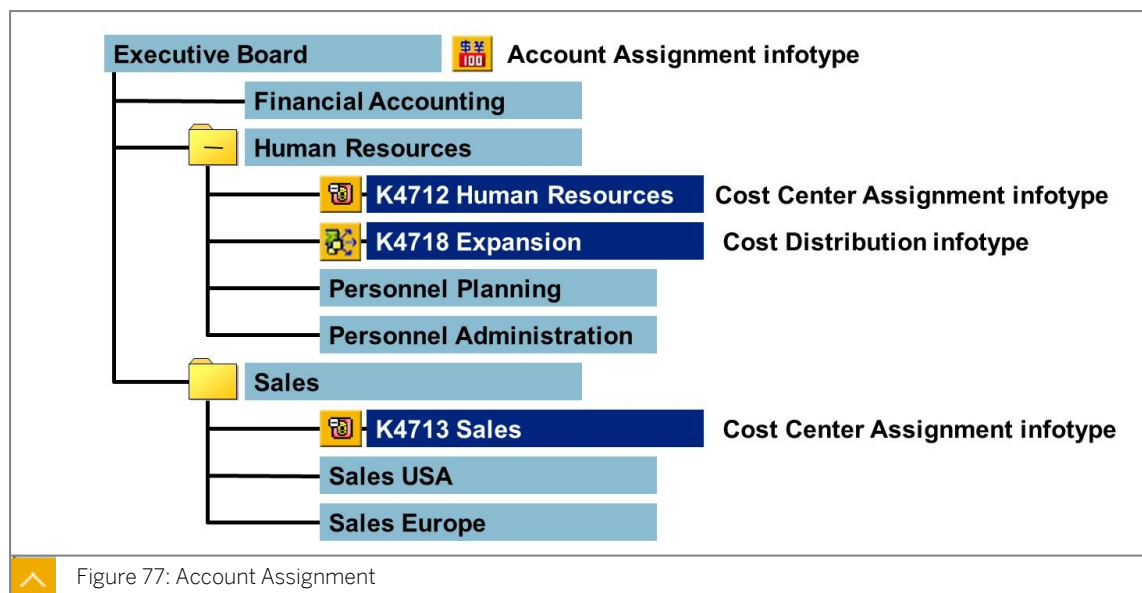


The reporting structure refers to the relationship between positions. Positions can be subordinate to other positions. *Simple Maintenance* offers the fastest and easiest way to build and maintain a reporting structure for an organizational plan.

The reporting structure is mainly determined by the organizational structure. However, you can create a reporting structure that deviates from the organizational structure.

The chief position is created in the organizational structure. After you have created the chief position, you can assign other positions to the chief position in the reporting structure.

## Account Assignment



The Account Assignment evaluation path enables you to use *Simple Maintenance* to maintain cost center assignments, cost distribution, and account assignment features.

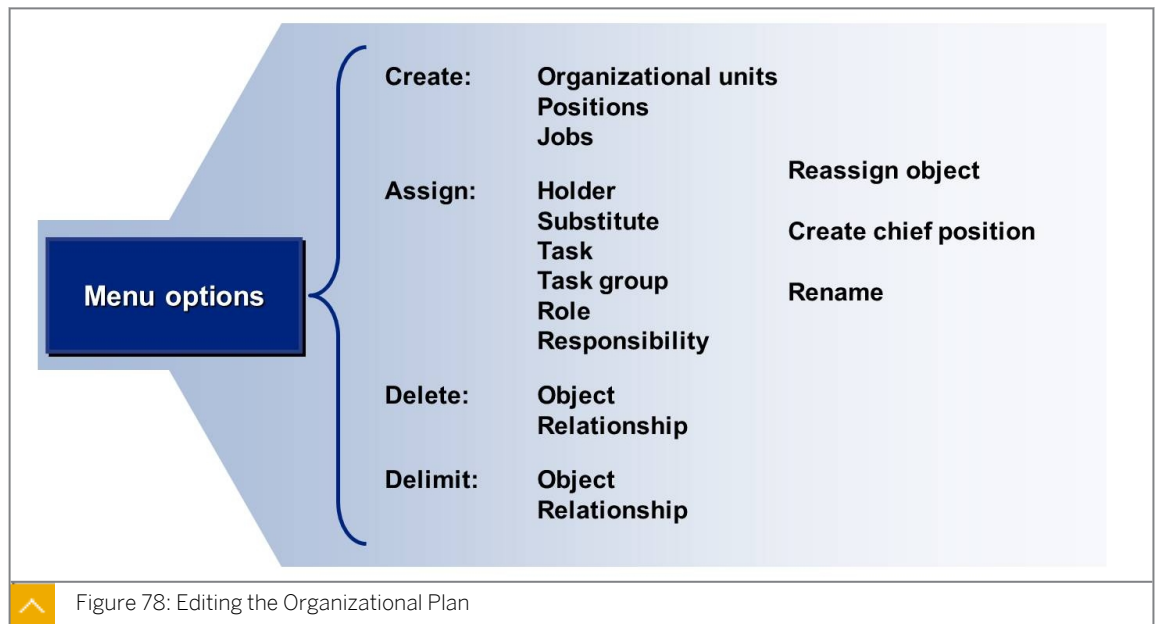


The **Account assignment features view** provides you with an editing interface tailored to the following cost-relevant infotypes:

- *Account Assignment Features* (IT1008)
- *Cost Distribution* (IT1018)
- *Cost Center Assignment* (IT1001, subtype A011)

The data entered from the *Simple Maintenance* interface is checked for validation. In contrast to the *Organization and Staffing* user interface, no inheritance information can be detected from the *Simple Maintenance* interface.

### Changes in the Organizational Plan



After you have selected an object, you can use the menu options to perform maintenance tasks or call the *Infotype Maintenance* interface. The figure shows the main menu options.



#### Hint:

Unlike the *Organization and Staffing* interface, the *Simple Maintenance* interface does not allow you to specify a reason when assigning a person. This means that you are not able to include Personnel Administration (PA) in the personnel action. In the case of a transfer, the *Actions* infotype (IT0000) is not filled on this interface.



### LESSON SUMMARY

You should now be able to:

- Set up an organizational structure using Simple Maintenance







### Learning Assessment

1. It is not possible to create a chief position in Simple Maintenance.

*Determine whether this statement is true or false.*

☐ True

☐ False

2. In Simple Maintenance, the different elements in an organizational plan are represented graphically by a:

*Choose the correct answer.*

☐ A Tree structure

☐ B Linear structure

☐ C Vertical structure

☐ D Functional structure

3. Simple Maintenance is the standard tool for creating larger structures.

*Determine whether this statement is true or false.*

☐ True

☐ False

4. In Simple Maintenance, you can recognize the inheritance of cost centers.

*Determine whether this statement is true or false.*

☐ True

☐ False

5. In Simple Maintenance, you can transfer persons to another position.

*Determine whether this statement is true or false.*

☐ True

☐ False



6. In Simple Maintenance, you can trigger personnel actions for a transfer in Personnel Administration.

*Determine whether this statement is true or false.*

☐ True

☐ False



### Learning Assessment - Answers

1. It is not possible to create a chief position in Simple Maintenance.

*Determine whether this statement is true or false.*

☐ True

☒ False

2. In Simple Maintenance, the different elements in an organizational plan are represented graphically by a:

*Choose the correct answer.*

☒ A Tree structure

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3. Simple Maintenance is the standard tool for creating larger structures.

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*Determine whether this statement is true or false.*

☒ True

☐ False

6. In Simple Maintenance, you can trigger personnel actions for a transfer in Personnel Administration.

*Determine whether this statement is true or false.*

☐ True

☒ False



## UNIT 6

# General Structures and Matrix Organizations

### Lesson 1

Maintaining General Structures

109

### Lesson 2

Maintaining Matrix Organizations

115

### UNIT OBJECTIVES

- Set up the organizational structure using the General Structures interface
- Maintain evaluation paths to link objects in the organizational structure
- Create multiple reporting structures with matrix organizations







## Maintaining General Structures

### LESSON OVERVIEW

This lesson explains how to work with the General Structures interface and maintain the organizational structure using objects and evaluation paths.

### Business Example

You need to map the holding company of your enterprise in the organizational plan. For this reason, you require the following knowledge:

- An understanding of the General Structures Interface
- An understanding of evaluation paths for the General Structures Interface

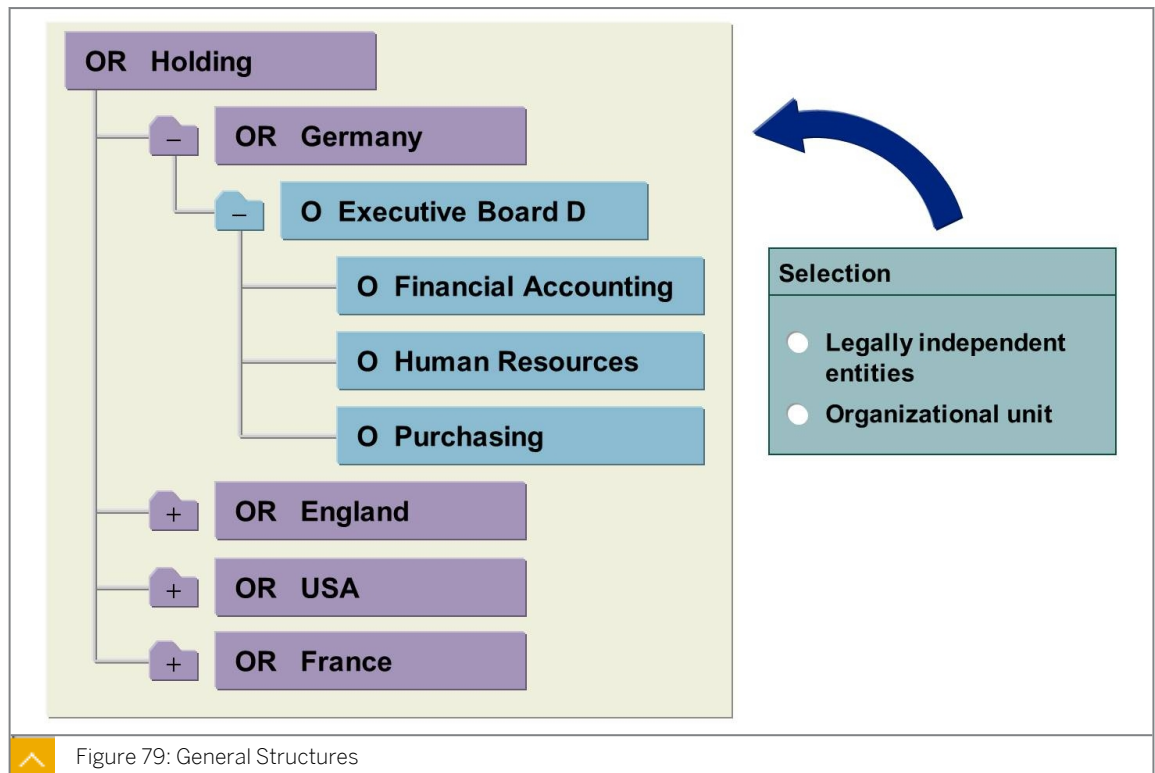


### LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Set up the organizational structure using the General Structures interface
- Maintain evaluation paths to link objects in the organizational structure

### General Structures





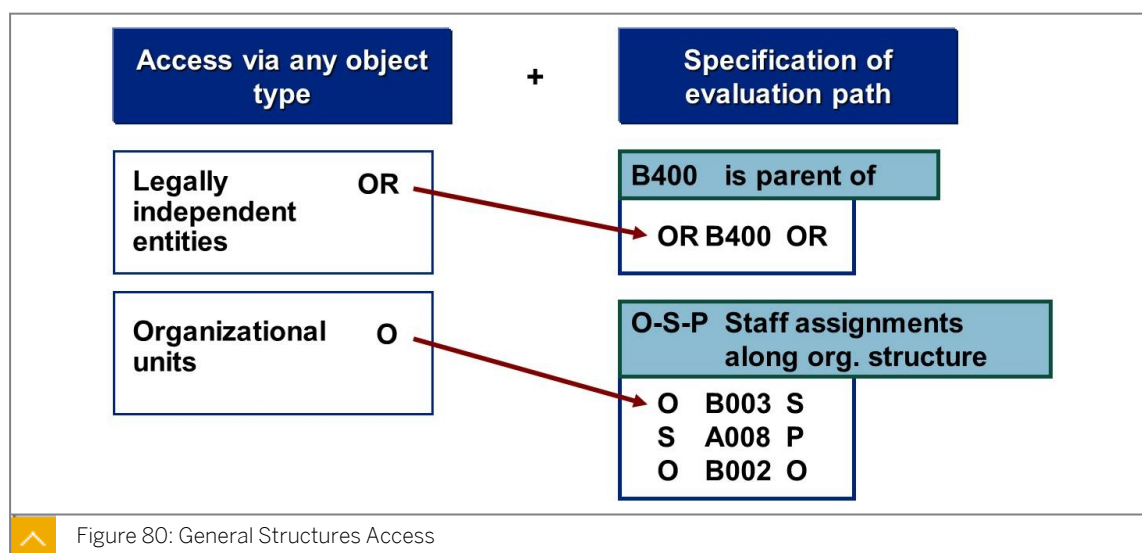
You can display and maintain other objects and structures in the organizational plan by using the *General Structures* interface in Organizational Management (OM). The interface works in the same way as the *Simple Maintenance* interface.

When you set up an organizational structure, you can map the holding company of your enterprise in the organizational plan. To do this, you use the Legal Entity (OR) object type and a new evaluation path.

A holding company is a corporation that possesses enough voting stock (common shares) in another company to influence its policies and management.

With the help of the root object type, object ID, and evaluation path, you can create, maintain, and display your structures. You can use the object type OR to map the legal situation of a holding company to the enterprises it manages. The object type OR is not included in any of the standard interfaces of OM. However, you can use the *General Structures* interface to represent these relationships.

### General Structures Access



The *General Structures* interface allows you to use all the object types and relationships available in Customizing. The *Simple Maintenance* and *Organization and Staffing* interfaces do not allow the use of all object types and relationships unless you make extensive changes to the Customizing settings. You can create objects and relationships along selected evaluation paths based on the root object.

**When you access the General Structures interface, you enter the following information:**

- Start object type
- Relevant object ID

You then need to select a valid evaluation path. The evaluation path you select determines the relationships that are displayed in the tree structure, starting with the root object. It also determines which relationships can be changed or created.



Hint:

If only one relationship has to be maintained between objects, the relationship itself is the evaluation path.



## Evaluation Paths for General Structures



**Example:**

**O-S-P Staff assignments along organizational structure**

O B003 S  
S A008 P  
O B002 O

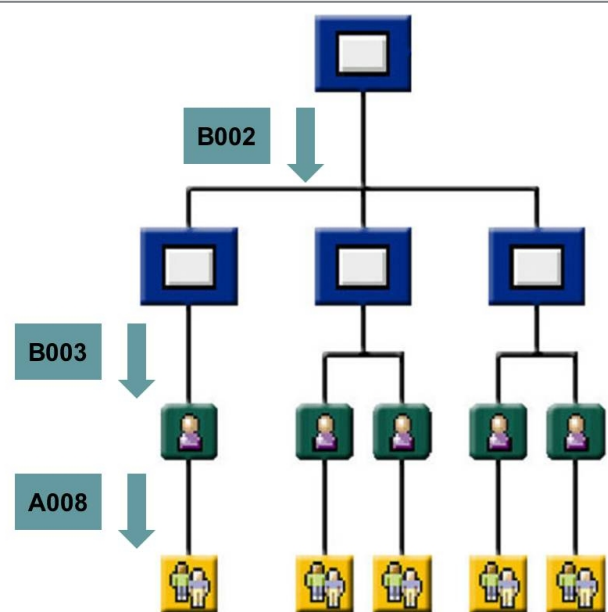


Figure 81: Evaluation Paths

An evaluation path represents a chain of relationships between particular object types. Evaluation paths define the relationships with which a structure is created. Objects can have several relationships. Consequently, not all the relationships of an object are displayed in one view.

For example, to view staff assignments along the organizational structure (evaluation path O-S-P), you can start with an organizational unit and identify relationships to positions. Then, from the positions, you can identify persons holding those positions. After this cycle is complete, you progress to a subordinate organizational unit, where you start the cycle again. Cost centers and their relationships to organizational units are not displayed for this evaluation path.



## Evaluation Paths: Search



Object Type

Object ID

Name

Evaluation Path

Editing Period  to

**Evaluation Path**

Find evaluation paths that contain relationships between the following object types:

From

Via

To



Figure 82: Finding Evaluation Paths

You can search for existing evaluation paths by using the object types you know. To enable you to choose the correct evaluation path, the *General Structures* interface allows you to enter up to three object types that exist in the evaluation path as selection criteria. To enter the object types, you can use the F4 help.

Enter the objects you want to find in the evaluation path as the selection criteria.



## Evaluation Paths: Maintenance



Evaluation Path	Info	Evaluation Path Text	
...		...	▲
...		...	▼
O-S-P		Staffing assignment along organizational structure	
...		...	

No.	Obj. Type	A/B	Relationship	Relationship Name	Priority	Type of Related Obj.	Skip	
10	O	B	003	Includes	*	S	<input type="checkbox"/>	▲
20	S	A	008	Holder	*	P	<input type="checkbox"/>	▼
30	O	B	002	Is line manager of	*	O	<input type="checkbox"/>	

Figure 83: Maintaining Evaluation Paths

You can create evaluation paths in Customizing for OM under *Basic Settings*. Relationships form the navigation paths for an evaluation. These relationships enable you to evaluate structural information, for example, the organizational plan or the reporting structure.

In the *Skip* field in the *Individual Maintenance* interface, you can specify that a particular navigation path must be evaluated, but that the results of the skipped object are not displayed. You can create alphanumeric evaluation paths with a maximum of eight characters, starting with Z.



### Caution:

Do not change any existing evaluation paths unless they are evaluation paths you have created yourself. These changes affect all programs and reports that use the evaluation path that you have changed in the background. Any changes you make could lead to system problems.

If you do not want to use a standard SAP evaluation path for reports that use an internal evaluation path, you can specify the alternative evaluation path in the *Value Abbr.* column.



## LESSON SUMMARY

You should now be able to:

- Set up the organizational structure using the General Structures interface
- Maintain evaluation paths to link objects in the organizational structure







## Maintaining Matrix Organizations

### LESSON OVERVIEW

This lesson shows how to set up a matrix organization.

### Business Example

In your organization, project teams are formed that include employees from various organizational units. You want to depict these teams in your system. For this reason, you require the following knowledge:

- An understanding of matrix organizations

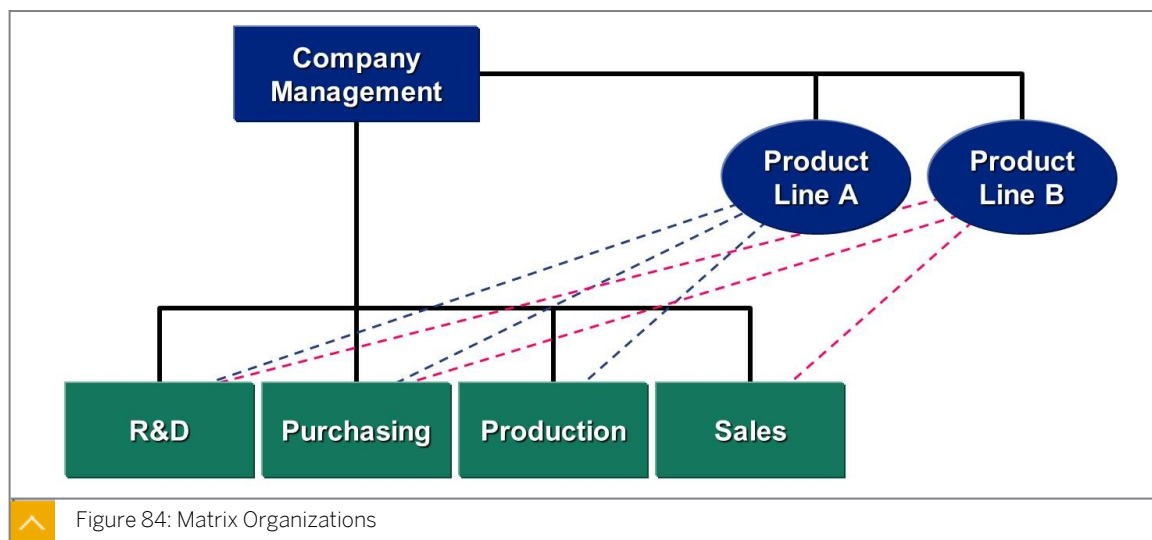


### LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Create multiple reporting structures with matrix organizations

### Matrix Organizations



A matrix organization is a two-dimensional chain of command in which positions or persons report to more than one superior. For example, in the product matrix organization shown in the figure, a position or department reports not only to the line manager but also to the manager of the product line.

One of the features of the matrix organization is that two-structure principles can overlap on the same level.

### Examples of two-structure principles include the following structures:

- Structures based on objects (for example, Finance, Manufacturing, and Human Resources)



- Structures based on tasks (for example, tasks based on product lines)

In the same way, you can also have structures based on other levels, such as projects and regions.

### Matrix Organizations: Defining the Matrix

Access through ...

Matrix type

Variant

Standard selection

Dimension 1

Object Type

Object ID

Evaluation Path

Dimension 2

Object Type

Object ID

Evaluation Path

Relationship

Relationship Type/Relationship

Relationship Object

Validity Period

Structure Dimension 1

Structure Dimension 2

Matrix View

Figure 85: Matrix Organizations - Defining the Matrix

Access options for matrix maintenance are as follows:

#### Matrix type:

If you select the *Matrix type* radio button, you select a predefined matrix type. Matrix types are defined in Customizing.

#### Variant:

If you select the *Variant* radio button, you can select a matrix that you previously saved as a variant.

#### Standard screen selection:

If you select the *Standard selection* radio button, you access a selection on which you can define the matrix view you want to work with. You must specify a root object and an evaluation path for each dimension of the matrix and the relationship that exists between the objects of the two dimensions.

You can then view the matrix or one of the two matrix dimensions.

The *Relationship* section of the selection screen shows the relationship created between the objects of the separate dimensions.



## Matrix Organizations: Creating Relationships



	Organizational Unit 1	Position 2	Position 3
Implementat'n Team 1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Implementat'n Team 2	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Relationship created

Figure 86: Matrix Organizations - Creating Relationships

In a matrix, you can create relationships between the objects of the two dimensions by selecting the relevant checkbox. The default validity period used is the period entered on the initial screen. The user can overwrite this value in the dialog box that is displayed.

**In the process of creating relationship, you can also execute the following functions:**

- Delete or delimit relationships.
- Invert the display of the two dimensions.
- Show or hide additional object information such as the ID, the abbreviation, or the validity period.



## Dimension Maintenance

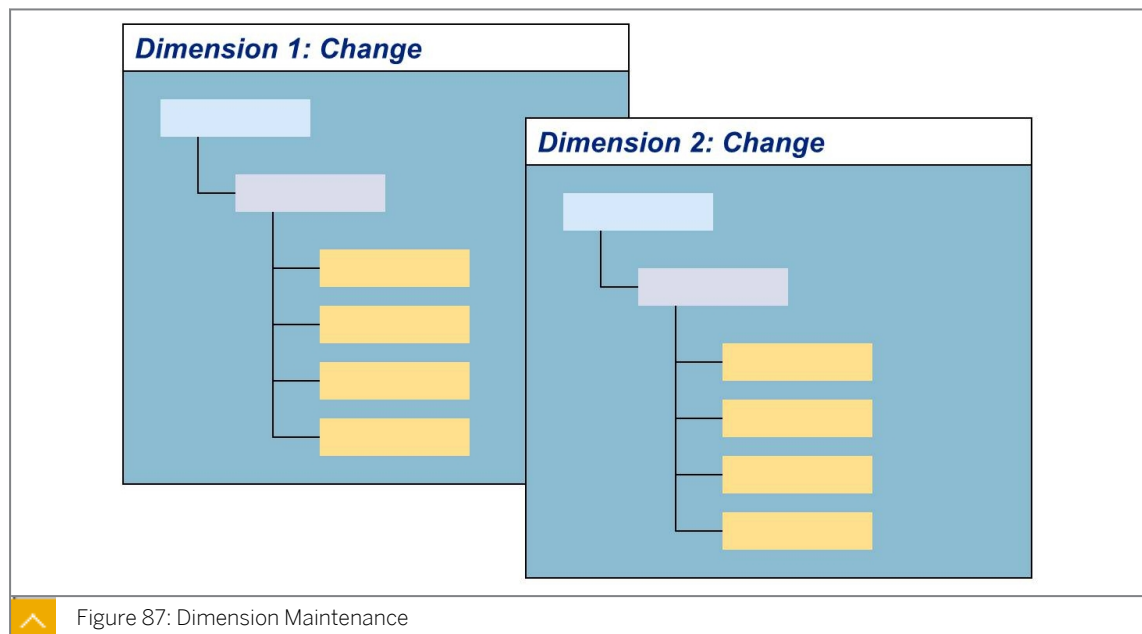


Figure 87: Dimension Maintenance

Each dimension of the matrix can be displayed and maintained individually. If you want to display each dimension separately, you are taken to the *General Structures* interface. Here, you can display or maintain the objects.

## Matrix Types



Figure 88: Defining Matrix Types

Matrix types are defined in Customizing. When you define a matrix type, you specify the structure of a matrix.

**To specify the structure, you select the following:**

- The possible evaluation paths
- The relevant start object type
- The relationships between the dimensions



You can then select the matrix types from the user interface.



### **LESSON SUMMARY**

You should now be able to:

- Create multiple reporting structures with matrix organizations







## Learning Assessment

1. What information is used to display structures on the General Structures interface?

*Choose the correct answer.*

- ☐ A Start object
- ☐ B Evaluation path
- ☐ C Validity period
- ☐ D All of the above

2. An evaluation path is a chain that links objects.

*Determine whether this statement is true or false.*

- ☐ True
- ☐ False

3. Which of the help functions on the General Structures interface can you use to find a suitable evaluation path and check its structure?

*Choose the correct answer.*

- ☐ A F8
- ☐ B F9
- ☐ C F4
- ☐ D F11

4. A matrix is a three-dimensional report structure on the same hierarchical level.

*Determine whether this statement is true or false.*

- ☐ True
- ☐ False



5. When you define the structure of a matrix, which of the following are some of the fields are you select?

*Choose the correct answers.*

- ☐ A Evaluation Path
- ☐ B Object type
- ☐ C Dimension
- ☐ D Relationship

6. In matrix organization, which of the following are the various access options for matrix maintenance?

*Choose the correct answers.*

- ☐ A Matrix type
- ☐ B Variant
- ☐ C Standard selection
- ☐ D Start object



### Learning Assessment - Answers

1. What information is used to display structures on the General Structures interface?

*Choose the correct answer.*

- ☐ A Start object
- ☐ B Evaluation path
- ☐ C Validity period
- ☒ D All of the above

2. An evaluation path is a chain that links objects.

*Determine whether this statement is true or false.*

- ☒ True
- ☐ False

3. Which of the help functions on the General Structures interface can you use to find a suitable evaluation path and check its structure?

*Choose the correct answer.*

- ☐ A F8
- ☐ B F9
- ☒ C F4
- ☐ D F11

4. A matrix is a three-dimensional report structure on the same hierarchical level.

*Determine whether this statement is true or false.*

- ☐ True
- ☒ False

A matrix is a two-dimensional report structure.



5. When you define the structure of a matrix, which of the following are some of the fields are you select?

*Choose the correct answers.*

- ☒ A Evaluation Path
- ☒ B Object type
- ☐ C Dimension
- ☒ D Relationship

6. In matrix organization, which of the following are the various access options for matrix maintenance?

*Choose the correct answers.*

- ☒ A Matrix type
- ☒ B Variant
- ☒ C Standard selection
- ☐ D Start object



# UNIT 7

## Integration in Organizational Management

### Lesson 1

Setting Up Integration Switches

127

### Lesson 2

Loading OM Files

139

### UNIT OBJECTIVES

- Set up integration settings
- Hire an employee and test the integration between OM and PA
- Download and upload OM files from a spreadsheet







## Setting Up Integration Switches

### LESSON OVERVIEW

This lesson shows you how to set up integration switches to ensure data sharing.

### Business Example

Your company is implementing Personnel Administration (PA) and Organizational Management (OM). To guarantee consistent data, you must ensure that the two components are integrated. For this reason, you require the following knowledge:

- An understanding of the integration between OM and PA
- An understanding of integration tools

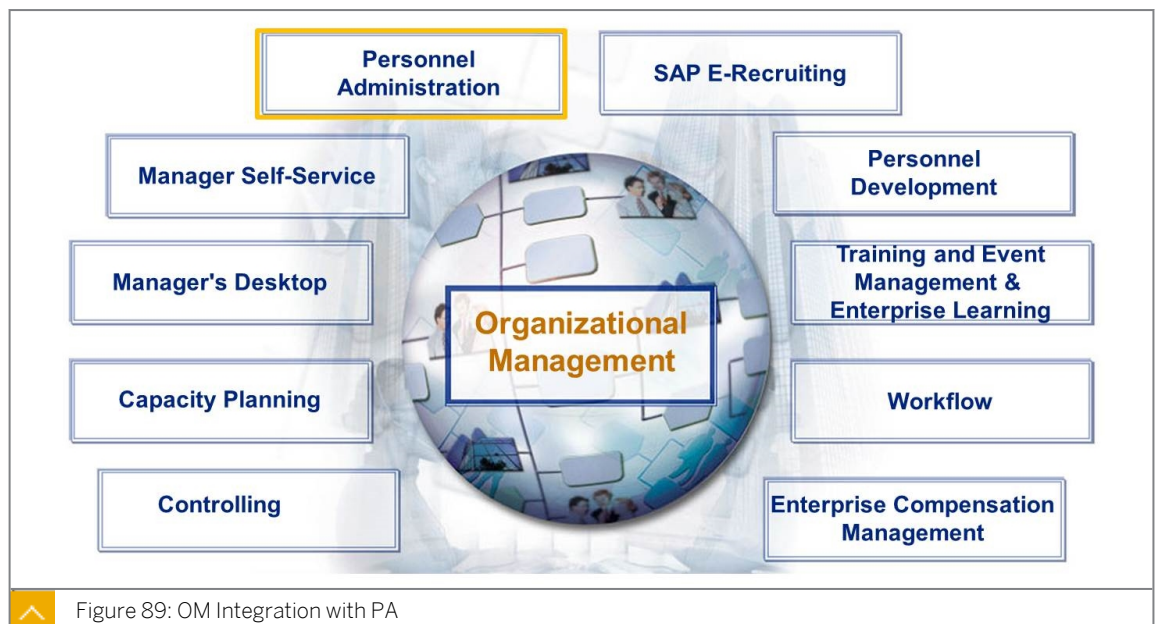


### LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Set up integration settings
- Hire an employee and test the integration between OM and PA

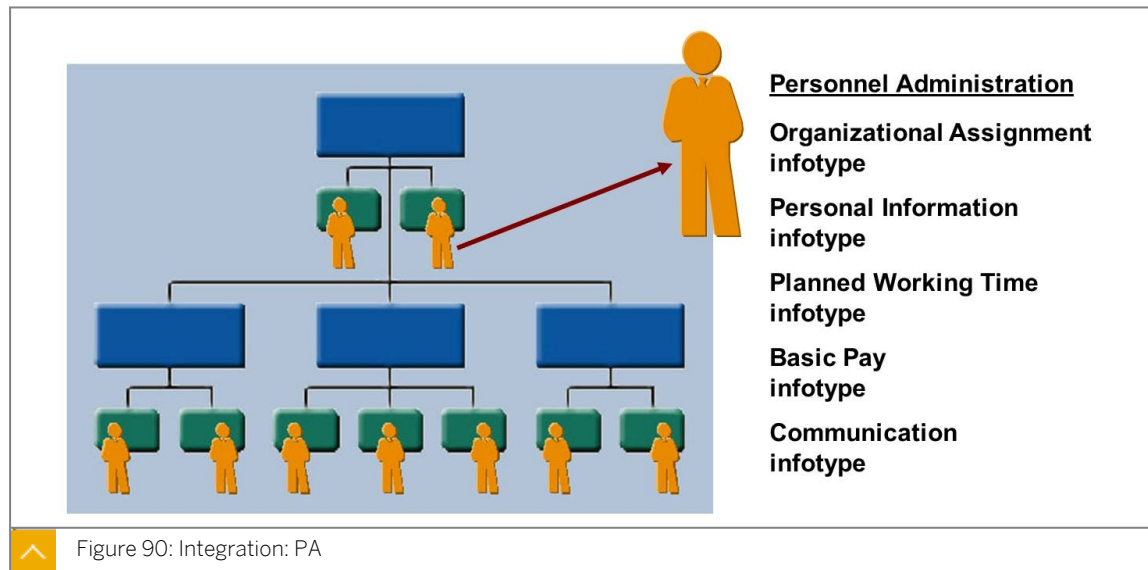
### Integration Between OM and PA



OM is integrated with PA so that the *Organizational Assignment* infotype is filled with data from OM when integration is active. Consequently, some of the infotype fields are no longer ready for input in the Maintain HR Master Data transaction.

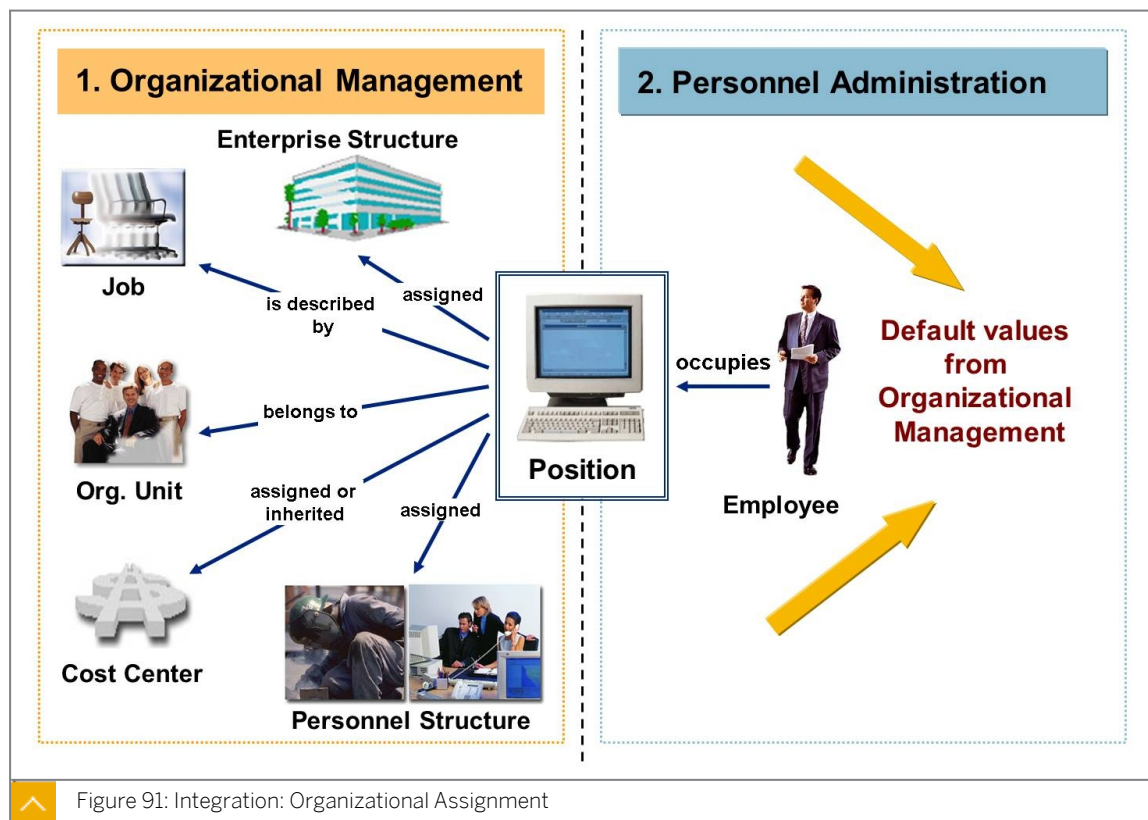


## Personnel Administration (PA)



Persons are objects that hold positions in an organizational structure. PA maintains person-related data. The integration of PA with OM enables you to automate some of the maintenance tasks.

## Organizational Assignment



If integration is active and a person is assigned to a position in HR master data, the objects linked with the position in HR master data are written to the *Organizational Assignment*



infotype. If integration is active, the *Organizational Unit*, *Job*, and *Cost Center* fields are not ready for input, but are filled in the Organizational Management infotype (IT0001) exclusively from OM.

In addition, every organizational change is stored in both the *Organizational Assignment* infotype in HR master data and the organizational plan in OM. This means that if a change made in OM affects the organizational assignment of a person, then the change in the HR master data is written to the *Organizational Assignment* infotype. Similarly, a change made to a person's organizational assignment (for example, as a result of a personnel action) in HR master data is updated in OM.

### Basic Integration Settings



#### Basic settings for integration with T77S0

	Group	Sem. Abbr.	Value Abbr.	Description
	PLOGI	PLOGI	01	Integration Variant / Active Plan Version
	PLOGI	ORGA	X	Integration Switch: Organizational Management

#### PLOGI Feature

Which employees are taken into account for integration between Organizational Management and Personnel Administration?



TCLAS	Transaction for Data Retention
MOLGA	Country Grouping
BUKRS	Company Code
WERKS	Personnel Area
BTRTL	Personnel Subarea
PERSG	Employee Group
PERSK	Employee Subgroup



Figure 92: Basic Integration Settings

The PLOGI feature is used to decide the employees that are taken into account for integration between OM and PA.

You must first set the integration plan version in the *PLOGI PLOGI* entry in table *T77S0*. If you do not define an integration plan version, integration is not active. You then specify the employees that need to be involved in integration. To do this, maintain the PLOGI feature.

#### You can form groupings according to the following criteria:

- Country grouping
- Company code
- Personnel area
- Personnel subarea
- Employee group
- Employee subgroup

Enter **x** in the *Value abbr* field of table *T77S0* to activate participation in integration. If there is to be no integration, leave the field blank.



If you activate the *PLOGI ORGA* switch in *T77S0* by entering **x**, you also activate integration between the PA and Personnel Planning components as a whole. *PLOGI ORGA* is the main integration switch. This switch enables PA and the organizational plan to remain consistent.

### Additional Integration Settings



Group	Sem. Abbr.	Value Abbr.	Description
PLOGI	EVENB	X	Enhanced Integration (X = On, Space = Off)
PLOGI	EVCCC	02	Master Data Action: Company Code Change
PLOGI	EVCRE	X	Generate Event for Entry T77INT
PLOGI	PRELI	99999999	Integration: Standard Setting
PLOGI	PRELU		Integration PA Update Online or Batch

PPABT	PPABT	1	Department Switch
-------	-------	---	-------------------

Figure 93: Additional Integration Settings

Examples of integration settings for the Group *PLOGI* include the following settings:

#### *PLOGI EVENB*:

If you set the *PLOGI EVENB* switch to **x**, you can move a person, position, or organizational unit within an organizational structure, if this change also requires a change in the company code for the affected person(s).

#### *PLOGI PRELI*:

If an employee has not been assigned to a position in the integrated system, you can use the default value contained in *PLOGI PRELI*.

#### *PPABT PPABT*:

If you use the department switch *PPABT PPABT*, you can activate the inclusion of the *Department* indicator in infotype 1003 for integration.

The following table lists the results received when you enter different values for *PLOGI PRELU*:

Value	Result
BTCI	<p>The changes in OM are not updated immediately in PA (<i>Organizational Assignment</i> info-type 0001).</p> <p>The personnel numbers affected by the change are collected before the new information is updated by a batch input later.</p>



Value	Result
" " or "0"	The update (between OM and PA) takes place immediately.
A numeric value	The system first determines how many personnel numbers are affected for each action in OM. If this number exceeds the numeric value, the same applies as for entry BTCL, or alternatively, as for entries " " or "0".

## Daily Routine Activities

### Day to Day Maintenance of the Organizational Plan

The Organizational plan is a dynamic structure. Occasionally organizational units will need to be moved, divided or merged. In most cases those organizational units will already contain positions and those positions will have holders. This means Personnel Administration records must also be updated.

### Moving Organizational Units and Positions

Moving an organizational unit or a position entails creating and delimiting relationships AB002 Reports (line) to/is Line Supervisor of and AB003 Belongs to / Incorporates. When you create a new relationship, time constraints on the relationships of that object force the system to delimit the old relationship(s).

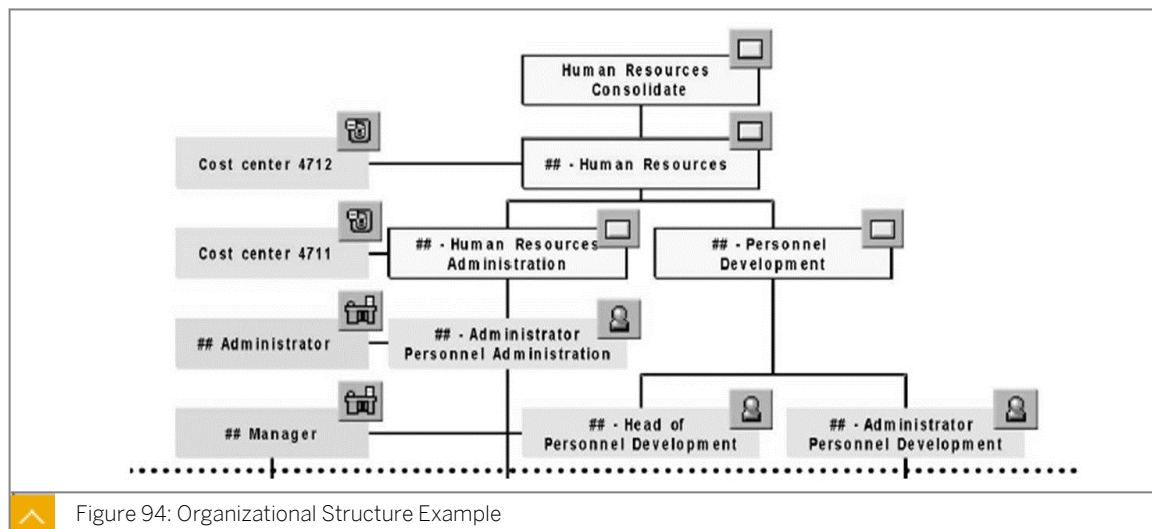


Figure 94: Organizational Structure Example

When you move organizational units to a different parent organizational unit, they take positions related by the *AB003 Belongs to / Incorporates relationship*, and any holders, with them.

The infotypes of moved organizational units or positions remain unchanged unless the new relationships force them to be delimited and new ones created. The best example of this is the inheritance of *Cost Centers* along the organizational structure. Organizational units automatically inherit the master cost center of the parent organizational unit when they are related, this could be at initial creation or when moved.

If the *PPOM INHS* switch is enabled (X) in table *T77S0*, the master cost center of a moved position is updated from the date of the new relationship. As in the creation scenario, the



Master cost center can subsequently be manually overwritten or split using the *Cost Distribution* infotype.

## Organization and Staffing Interface

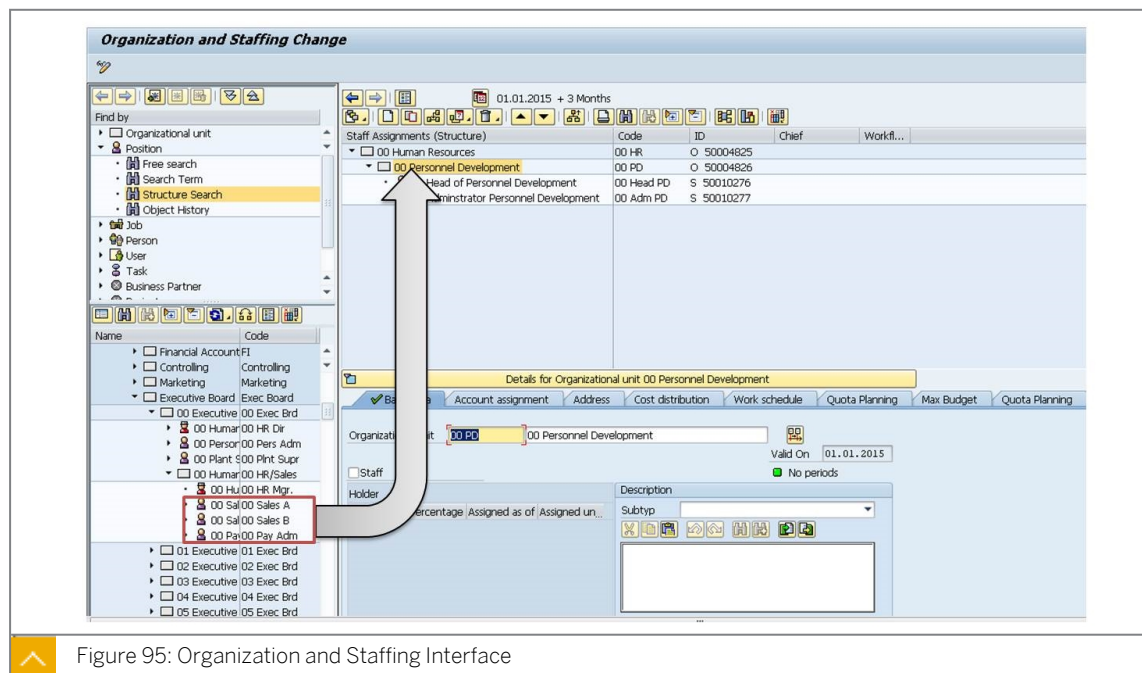


Figure 95: Organization and Staffing Interface

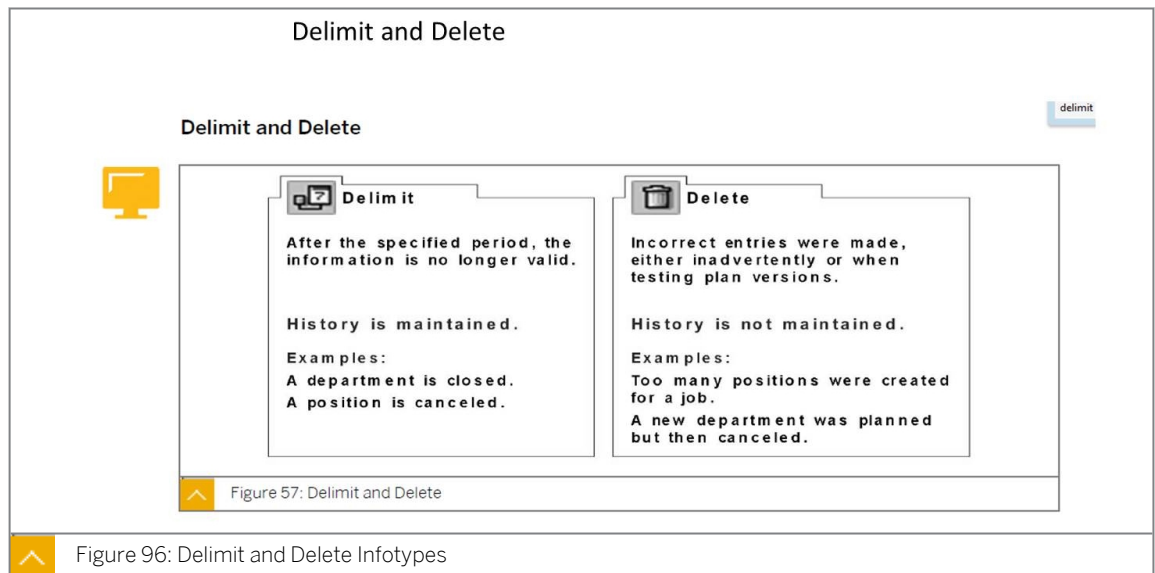
Although relationships and infotypes can be maintained in a variety of interfaces, *Organization and Staffing* is ideal for these kinds of operations because it allows multiple objects to be maintained at once and provides visual confirmation of new relationships.

## Delimiting Positions and Organizational Units

When non-manager positions are moved to another organizational unit there should be no need to move the manager position to the new location. It could be moved if it is to continue without manager responsibilities, approvals, and workflow but the most likely scenario is that the holder is transferred out of the position and the position is delimited.

An organizational unit cannot be delimited if it contains positions because the system would also attempt to delimit the *AB003 Belongs to / Incorporates* relationship to the position. Once all positions have been delimited, the obsolete organizational unit can be delimited.



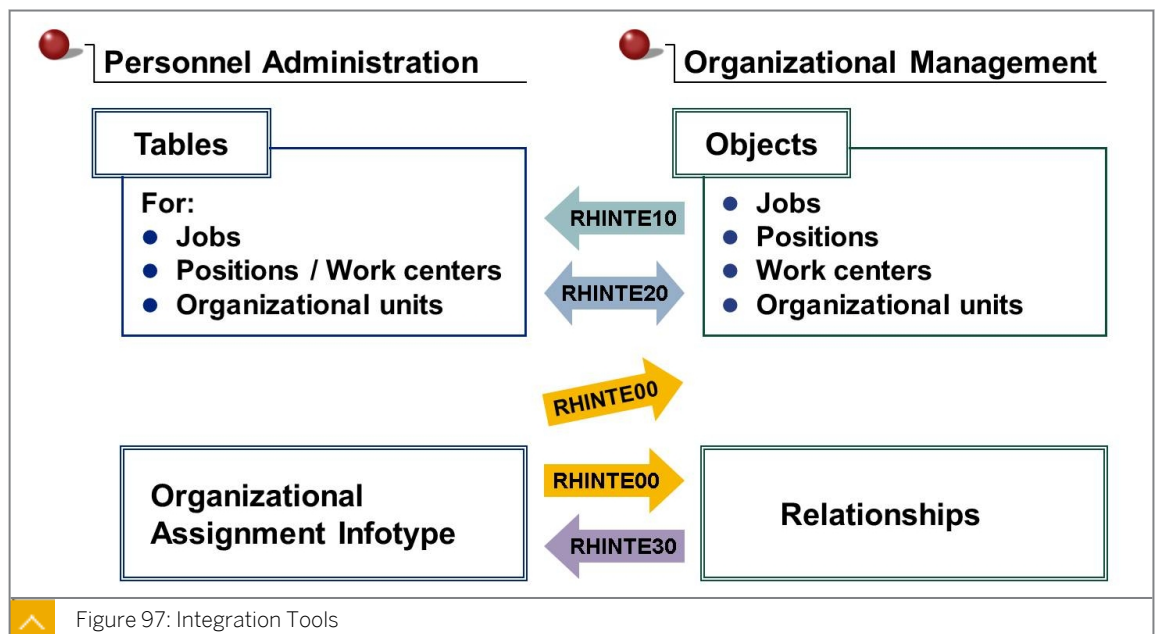


Positions and organizational units that are no longer required must still exist historically. This is achieved by delimiting instead of deleting.

When delimiting positions or organizational units, the date requested by the system is the last date on which the object should exist.

To delimit a position or organizational unit, you must delimit all dependent relationships by transferring or terminating the holders of the positions and delimiting or moving the positions. The position or organizational unit is then delimited.

## Integration Tools



The sequence in which you activate integration depends on one of the following constellations:

- You already use PA and want to implement OM. The data in PA already includes information about organizational units and positions.



- You already use OM and PA is to be integrated with OM.

If HR master data is available in PA, you can use report RHINTE00 to transfer the data to OM.

**The following reports are used to transfer data from OM to PA:**

#### Report RHINTE10:

Generates the required table entries in PA for OM objects that are relevant for integration.

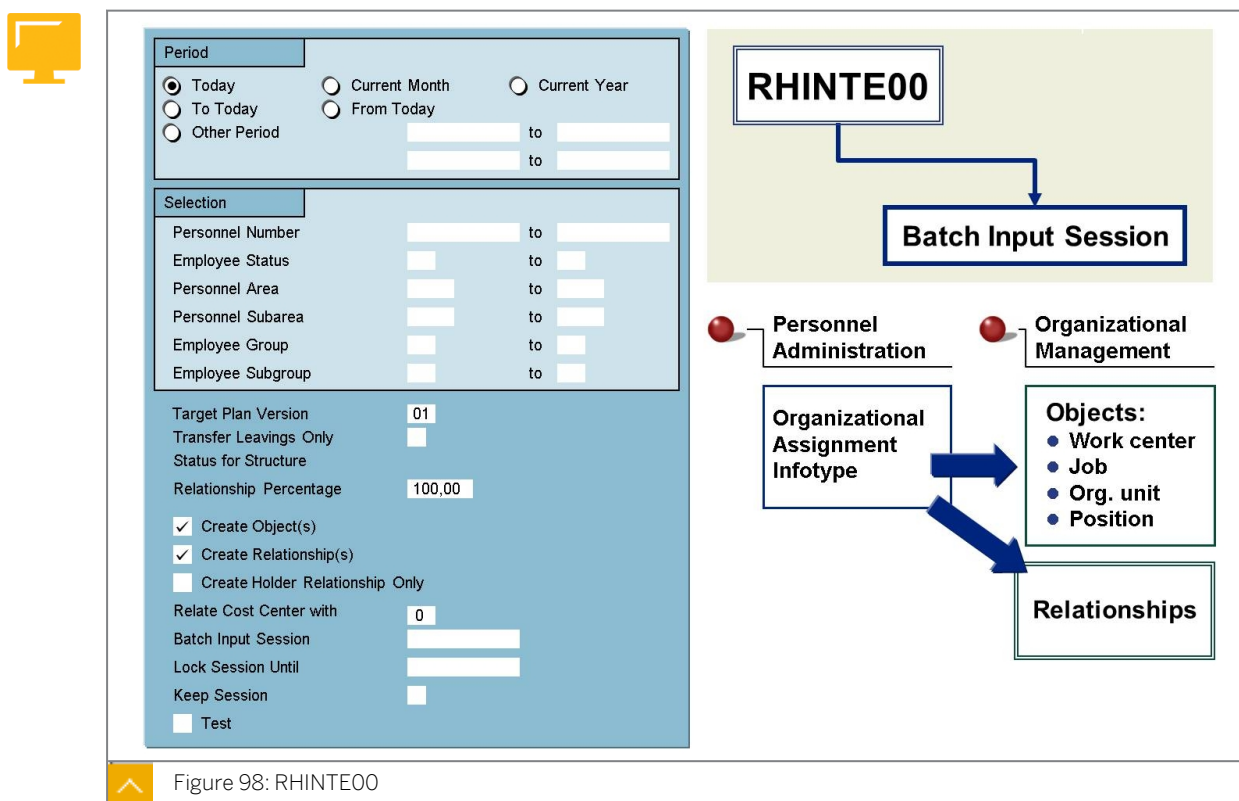
#### Report RHINTE30:

Allows you to transfer a person's organizational assignments, such as positions and organizational units, from OM to the *Organizational Assignment* infotype in PA.

#### Report RHINTE20:

Checks whether all of the objects relevant for integration exist in both PA and OM.

#### Report RHINTE00



Report RHINTE00 reads the *Organizational Assignment* infotype records created in PA. It creates a batch input session that in turn creates the relevant OM objects and relationships, depending on the parameters you set.

#### Details of the Objects and Relationships to be Created

**The following tables provide the details of the objects and relationships created:**

Objects Created	Description of Relationship
Work Center	Object type A
Job	Object type C



Organizational Unit	Object type O
Position	Object type S

Relationship Created	Description
S <-> P	Person is holder of position, A/B 008
A <-> P	Person is holder of work center, A/B 008
C <-> S	Job describes position, A/B 007
O <-> S	Organizational unit incorporates position, A/B 003
O <-> K	Master cost center assignment, A 011
S <-> K	Master cost center assignment, A 011, depending on the report parameters

No relationships between organizational units or between positions are created. These relationships must be maintained manually in OM. If you select the *Create Holder Relationships Only* option, the report transfers only those assignments of persons to positions that have changed to OM.

### Report RHINTE10



**RHINTE10**

**Organizational Management objects**

**Table entries in Personnel Administration**

**Objects**

Plan Version: 01

Object Type:

Object ID:

Search Term:

Object Status: 1

Data Status: 1

Set Structure Conditions

**Reporting Period**

☒ Today ☐ All

☐ Current Month ☐ Past

☐ Current Year ☐ Tomorrow

Key Date

Other Period

**Structure Parameters**

Evaluation Path:

Status Vector:

Display Depth:

Status Overlap

Test

Figure 99: Report RHINTE10

**Report RHINTE10 enables you to transfer the following objects created in OM to HR master data:**

- Organizational unit



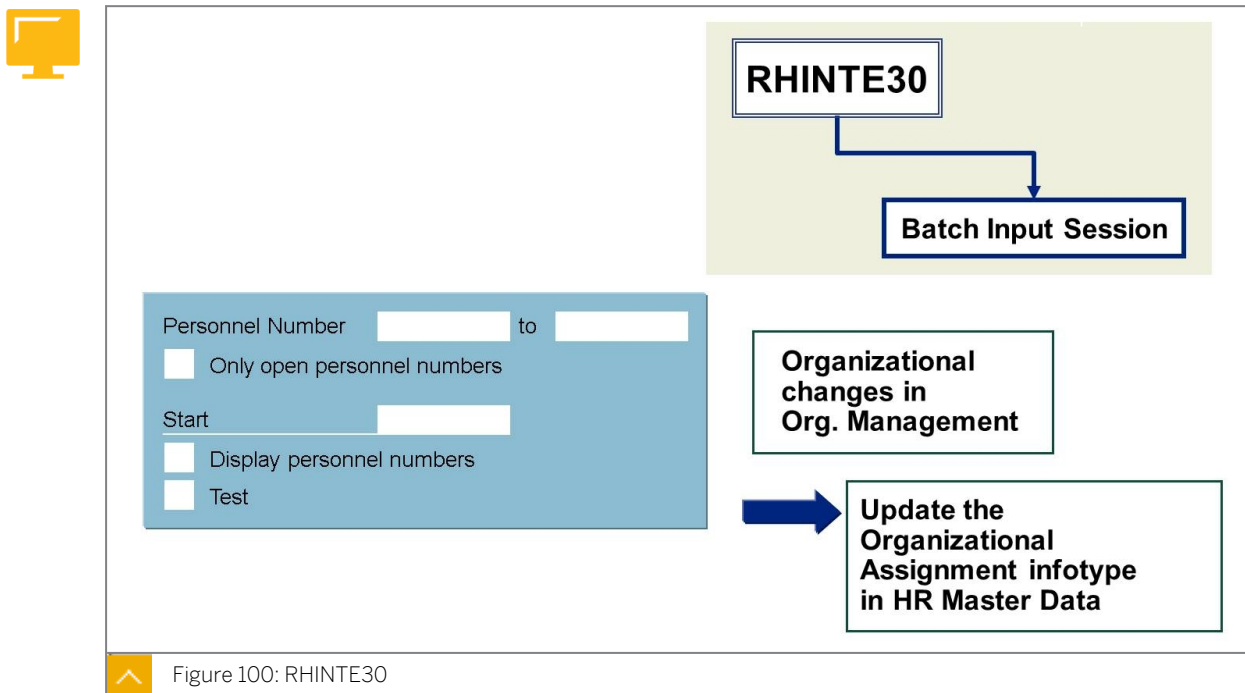
- Job
- Position
- Work center

Only objects that have the status *1* (active) in the integration plan version are transferred.

The integration objects are required for the *Organizational Assignment* infotype. A program run can take place for one or all object types, or for a selected structure.

You can also use report RHINTE10 to delete objects in the Customizing tables for PA. You need to be particularly careful when you delete objects.

### Report RHINTE30

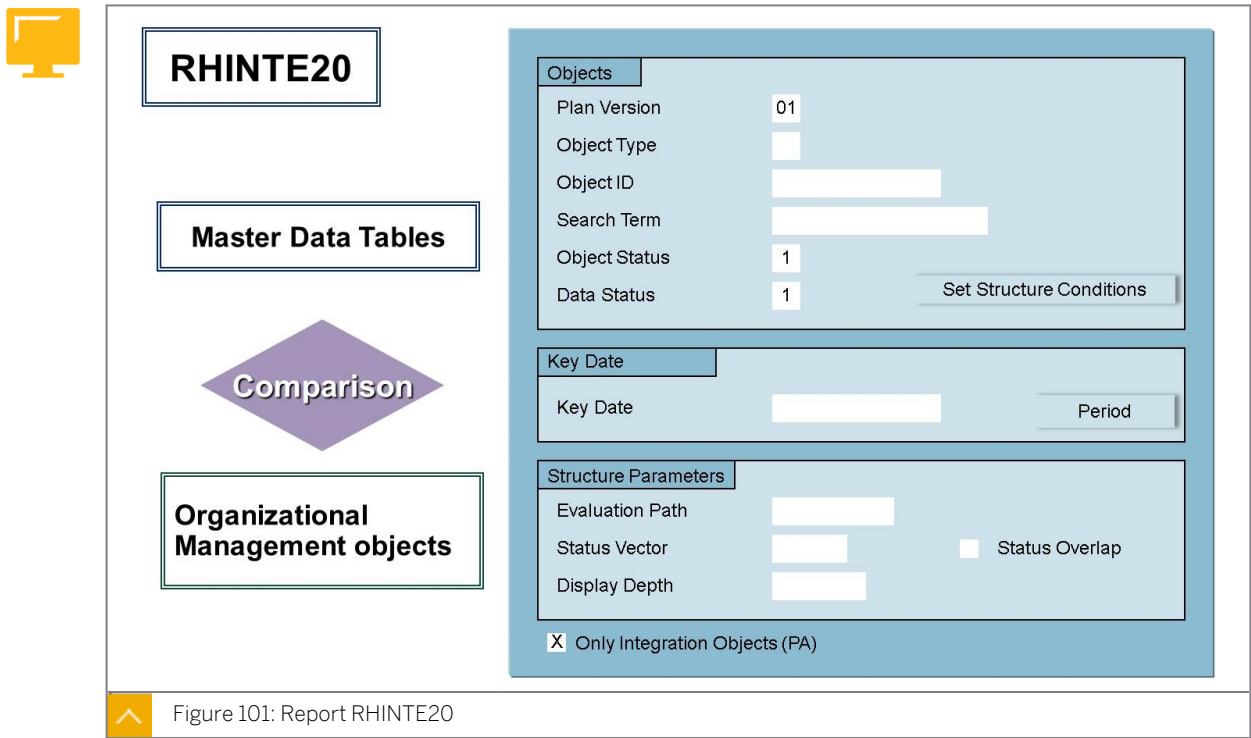


Report RHINTE30 enables you to update the *Organizational Assignment* infotype (PA) for the selected personnel numbers with data created by previous actions in OM.

Report RHINTE30 creates a batch input session for a particular group of persons. The session updates the *Organizational Assignment* infotype for the corresponding group of persons. The organizational assignment that was created by previous actions in OM is transferred to the *Organizational Assignment* infotype. A new record is created in the infotype for the start date entered. You must activate integration between OM and PA before starting the report.

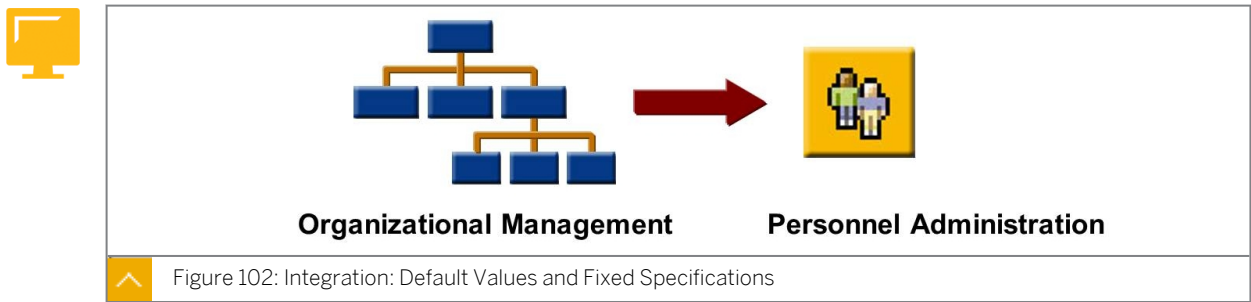


Report RHINTE20



Report RHINTE20 enables you to check whether the object types relevant for integration have been created in both PA and OM. Objects in master data tables include jobs, work centers/positions, and organizational units. OM objects include work center, job, organizational unit, and position. You can add objects that are missing in either PA or OM immediately.

Integration: Default Values and Fixed Specifications



OM can support PA by providing default values.

The following table shows the default values in OM with the corresponding specifications in PA:

Organizational Management	Personnel Administration
<i>Assignment to position</i>	Provides entries in <i>Organizational Assignment</i> infotype (IT0001) in organizational plan area
<i>Cost Center Assignment relationship</i>	Provides entry in <i>Cost Center</i> field in <i>Organizational Assignment</i> infotype (IT0001)



Organizational Management	Personnel Administration
<i>Cost Distribution infotype</i>	Is relevant for Payroll and Personnel Cost Planning
<i>Employee Group/Subgroup infotype</i>	Provides the default values in <i>Actions</i> infotype
<i>Planned Compensation infotype</i>	Delivers pay-scale information for basic pay
<i>Work Schedule infotype</i>	Enables comparison of work schedule hours with the working time stored in the <i>Planned Working Time</i> infotype (IT0007)
<i>Account Assignment Features infotype</i>	Provides the default values in <i>Actions</i> and <i>Organizational Assignment</i> infotypes

**LESSON SUMMARY**

You should now be able to:

- Set up integration settings
- Hire an employee and test the integration between OM and PA



## Loading OM Files

### LESSON OVERVIEW

This lesson gives you a high level understanding of the Legacy System Migration Workbench transaction and its relevance to the creation of Organizational Management objects and relationships.

#### Business Example:

Your company requires the one time mass creation of Organizational Management objects and relationships based on data held in a spreadsheet. For this reason you require the following knowledge.

- An understanding of one time data load in the Legacy System Migration Workbench



### LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Download and upload OM files from a spreadsheet

### Upload OM Files

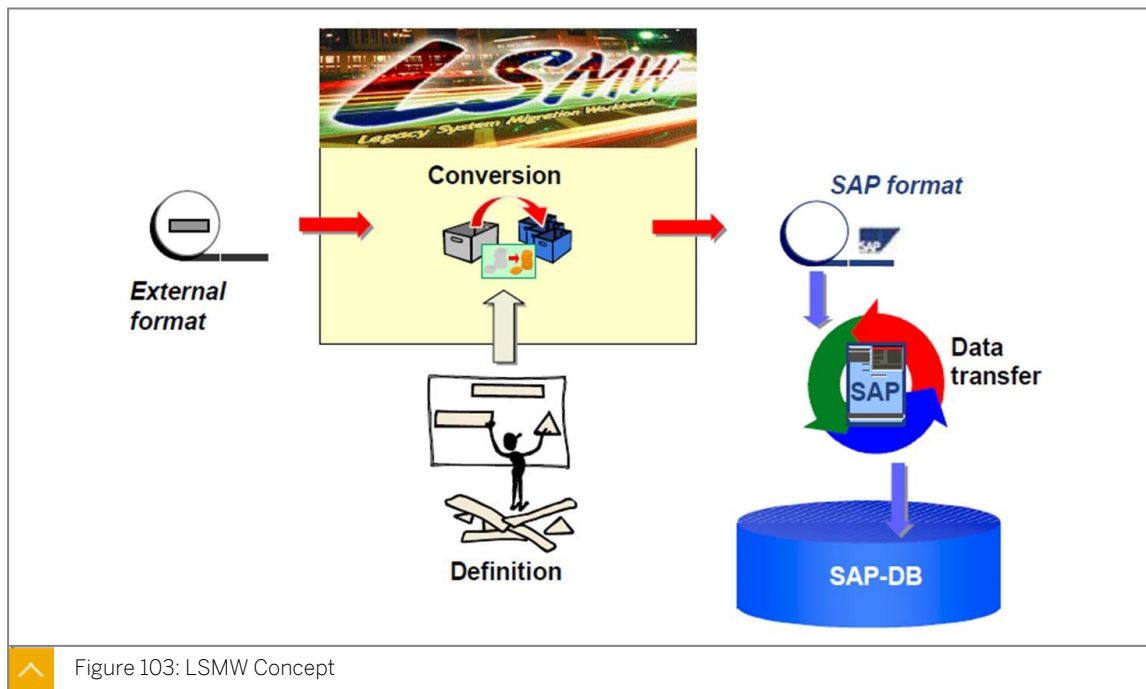
Legacy System Migration Workbench (LSMW) is an ECC6 tool that supports one-time and periodic transfer of data from non-SAP systems (legacy systems) to ECC6. This easy-to-use tool supports the conversion of data from the non-SAP system that can then be imported into the ECC6 System using batch input, call transaction, direct input, BAPIs, or IDocs.

LSMW provides a recording function, which you can use to generate a data migration object from a create or change transaction. In the HCM scenario of loading Organizational Management data the creation of a one-time load is the relevant option. The recording function is to record object creation. A spreadsheet is used to provide the new object data. Periodic or scheduled repeating transfers are not possible in this scenario.

Loading data into the Personnel Administration and Organization Management databases from spreadsheets coupled with a recording is a straightforward way to work. The PNPCE and PCH logical databases have a simple 'Flat' structure and spreadsheets are a familiar tool for use in data management. Because these types of load are so commonly used, the LSMW application contains model entries in the form of Projects, Subprojects and Objects. We will review the process to create OM objects.

For more details on LSMW with other data transfer scenarios please see Course BC320 - Data Transfer.





At its highest level the process of using LSMW with a spreadsheet and a recording is as follows:

- Configure the system to allow external object ID entry
- Create an external file storing the data to upload
- Create a structure to read the data into the Read file
- Read in the data
- Create a mapping of fields and instructions for any conversion of the data
- Convert the data and store in the Convert file
- Select the method of data transfer, in our case, a batch file
- Run the batch file and replicate the entry of the data as if using the recorded transaction

Data loaded in this way is still validated in the same manner as it would be via the transaction you recorded.

#### System preparation: External Object ID range

Creating new OM objects from a spreadsheet includes supplying the new object ID numbers as a column of data in the spreadsheet. This represents External numbering and requires the range of ID numbers you wish to use to be configured as allowed for external entry in the relevant customizing table. The ID numbers being uploaded must be un-used in the target system or they will be rejected.



## LSMW Project Structure



### Initial Screen: Transaction LSMW

#### LSMW Organized by:

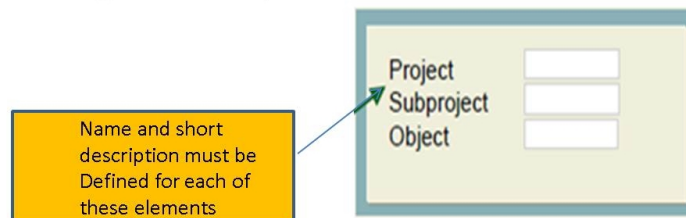


Figure 104: Project Structure

As of SAP NetWeaver Application Server Release 6.20, the LSMW is integrated in the SAP system. It is accessed via transaction LSMW. Work is organized into Projects, Subprojects and Objects. When working with OM objects we will have separate LSMW objects for object 1000 and for object 1001 which will be loaded in that order.

## LSM Projects Subprojects and Objects

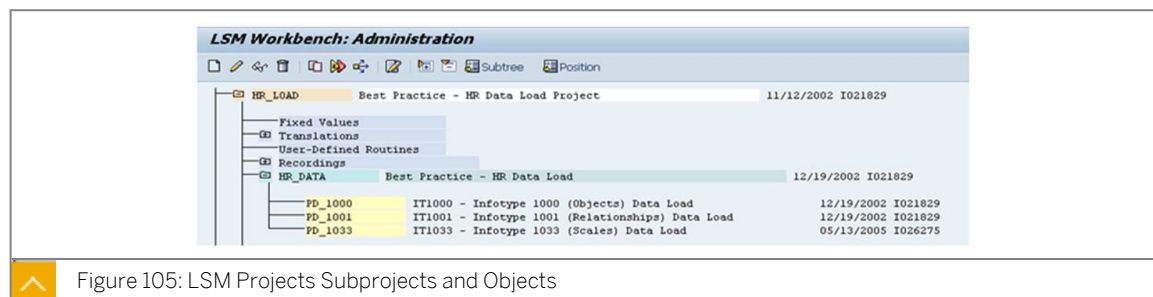
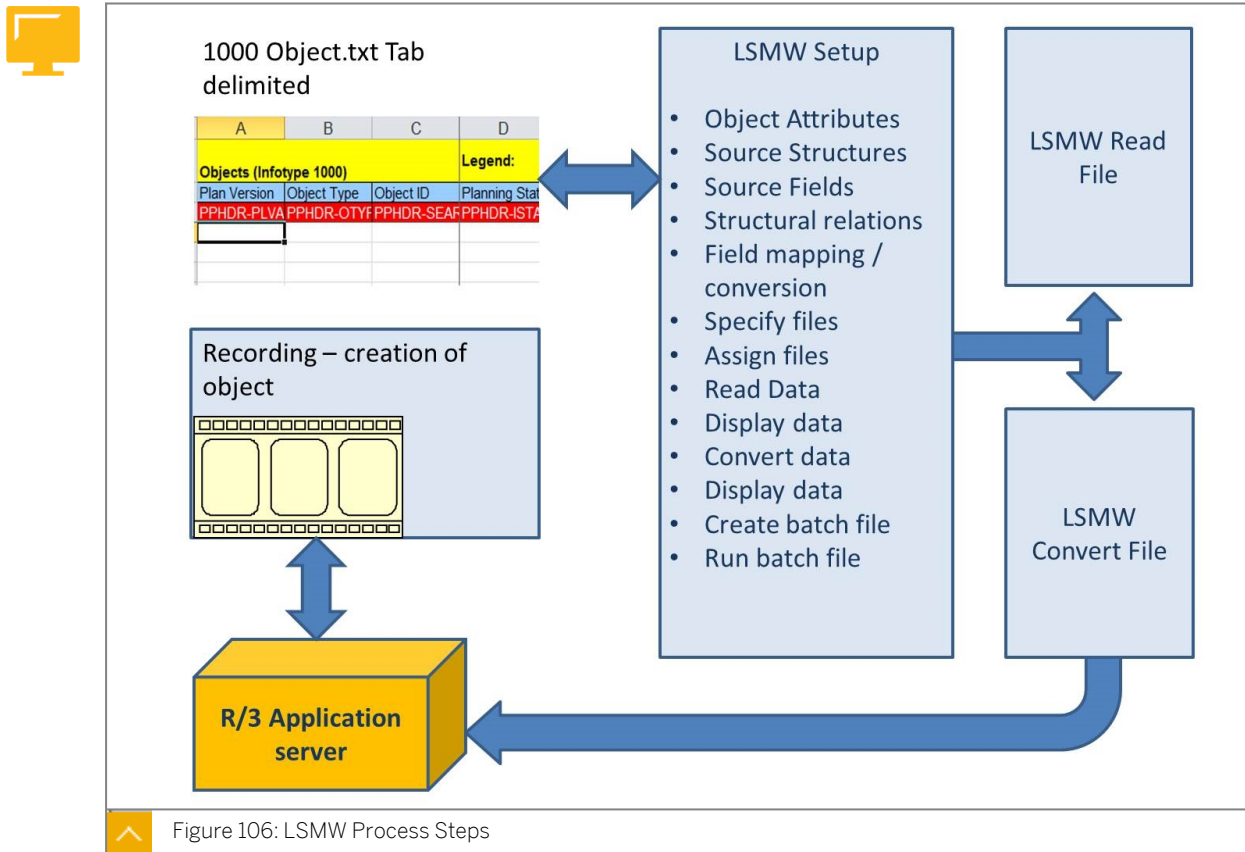


Figure 105: LSM Projects Subprojects and Objects

## LSMW Process Steps

When we create an object in a project and subproject, a default sequence of process steps is displayed for that object. Our job is to create the setup for each step.





## LESSON SUMMARY

You should now be able to:

- Download and upload OM files from a spreadsheet



## Learning Assessment

1. Which of the following reports reads the Organizational Assignment infotype records created in Personnel Administration (PA) and creates entries in Organizational Management (OM)?

*Choose the correct answer.*

- ☐ A RHINTE10
- ☐ B RHINTE20
- ☐ C RHINTE31
- ☐ D RHINTE00

2. RHINTE30 transfers a person's organizational assignment from Organizational Management (OM) to \_\_\_\_\_.

*Choose the correct answer.*

- ☐ A Integration Management
- ☐ B Personnel Administration (PA)
- ☐ C Personnel Management
- ☐ D Organizational Administration

3. If integration between Organizational Management (OM) and Personnel Administration (PA) is active, every organizational change is stored in both the Organizational Assignment infotype in HR master data and in the organizational plan in OM.

*Determine whether this statement is true or false.*

- ☐ True
- ☐ False

4. You can use Organizational Management (OM) to generate default values for Personnel Administration (PA).

*Determine whether this statement is true or false.*

- ☐ True
- ☐ False



## Learning Assessment - Answers

1. Which of the following reports reads the Organizational Assignment infotype records created in Personnel Administration (PA) and creates entries in Organizational Management (OM)?

*Choose the correct answer.*

- ☐ A RHINTE10  
☐ B RHINTE20  
☐ C RHINTE31  
☒ D RHINTE00

2. RHINTE30 transfers a person's organizational assignment from Organizational Management (OM) to \_\_\_\_\_.

*Choose the correct answer.*

- ☐ A Integration Management  
☒ B Personnel Administration (PA)  
☐ C Personnel Management  
☐ D Organizational Administration

3. If integration between Organizational Management (OM) and Personnel Administration (PA) is active, every organizational change is stored in both the Organizational Assignment infotype in HR master data and in the organizational plan in OM.

*Determine whether this statement is true or false.*

- ☒ True  
☐ False



4. You can use Organizational Management (OM) to generate default values for Personnel Administration (PA).

*Determine whether this statement is true or false.*

☒ True

☐ False







## UNIT 8

# Self-Services in Organizational Management

### Lesson 1

Updating Information Using Manager's Desktop (MDT)

149

### Lesson 2

Updating Information Using Manager Self-Service (MSS)

157

### UNIT OBJECTIVES

- Update the organizational structure using MDT
- Update position information using MSS







## Updating Information Using Manager's Desktop (MDT)

### LESSON OVERVIEW

This lesson shows you how to process organizational changes by using Manager's Desktop (MDT).

### Business Example

You need to implement a single point of entry and easy-to-use tool for managers in your enterprise to support them in their daily administrative and organizational tasks. For this reason, you require the following knowledge:

- An understanding of MDT
- An understanding of how to use MDT
- An understanding of the integration between MDT and Organizational Management (OM)



### LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Update the organizational structure using MDT

### Manager's Desktop (MDT)



MDT provides support for managers when they perform administrative and planning tasks. MDT supports managers who have personnel responsibility.



**MDT has the following functions:**

- It allows you to access organizational structures that include employees who are directly and indirectly assigned to your area of responsibility.
- It takes line managers directly to the personnel data of individual employees.
- It displays budget overviews that allow managers to compare planned and actual costs.
- It displays the current leave situation, and provides a reliable basis for making decisions about employees leave requests.

MDT is integrated with the InfoSet Query. Department heads can report on all employee-related data and access customer-specific reports.

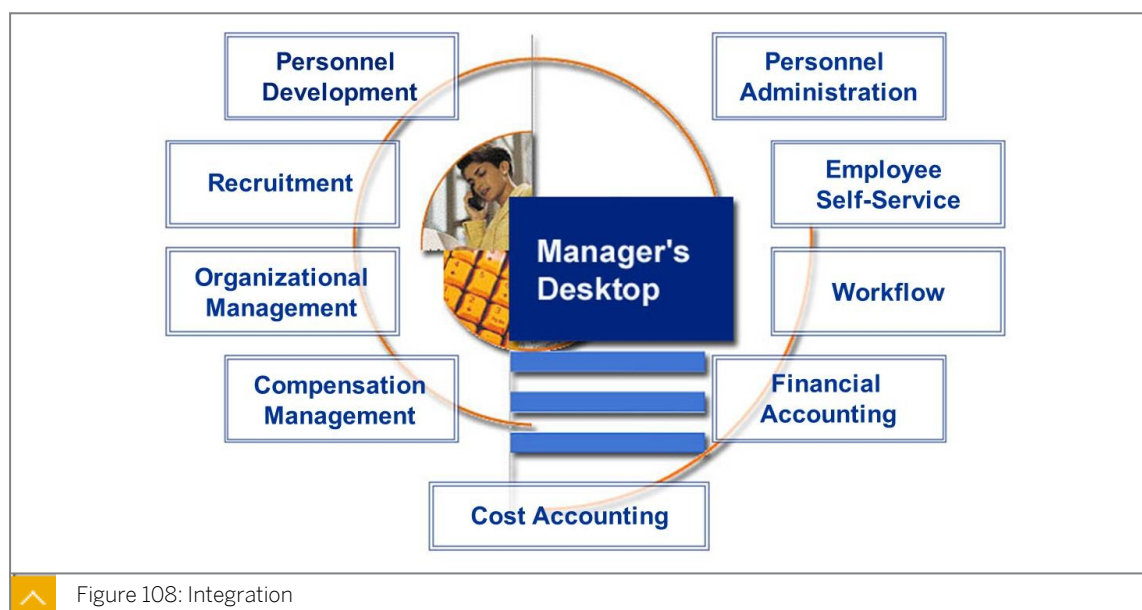
**Integration with Other Applications**

Figure 108: Integration

MDT brings together cross-application functions that allow the line manager immediate access to the relevant HR data. MDT not only integrates managers and Human Resources, but also allows managers to access information such as budgeting information.

**MDT integrates with other applications in the following way:****Integration with Personnel Administration (PA):**

Integration with PA must be active if you want to make transfers or change jobs or positions. If integration is not active, error messages are displayed.

**Integration with Financial Accounting (FI):**

Integration with FI must be active if you want budget evaluation to be possible and cost center information to be available.

**Integration with Workflow Support:**

Workflow Support ensures that employees in the HR department are seamlessly integrated in these processes.

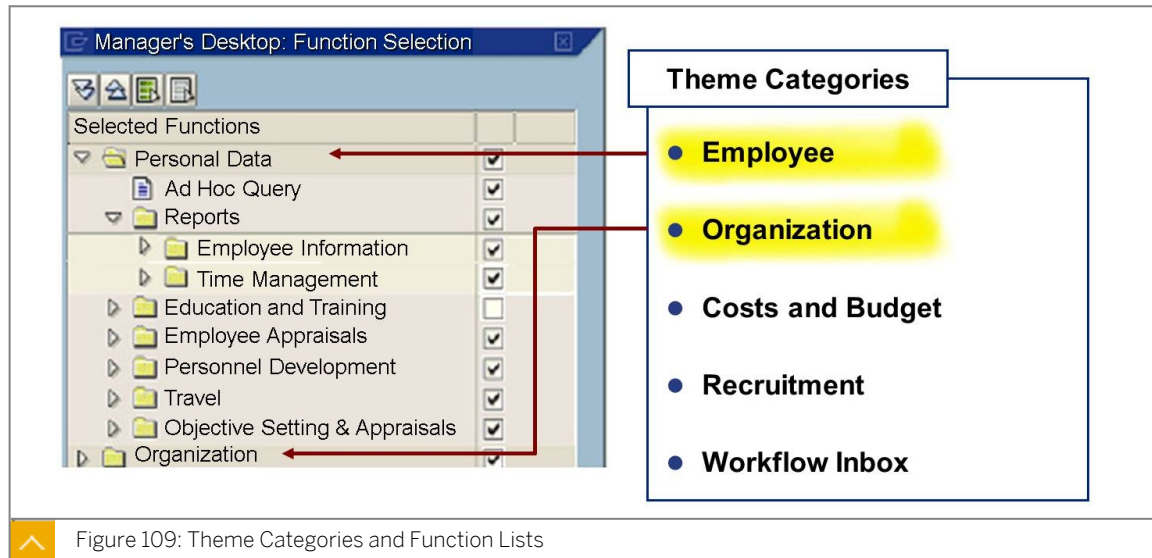
**Integration with employee self-service (ESS):**

If you use ESS, employees can enter leave requests or submit travel expenses directly in the system. These requests are then forwarded to the relevant manager's inbox in MDT, where the manager can check and approve the data. Approved requests or rejections are



sent through SAP Workflow to the HR department and the employee concerned. MDT allows managers to participate in processes in ESS.

### Theme Categories and Function Lists



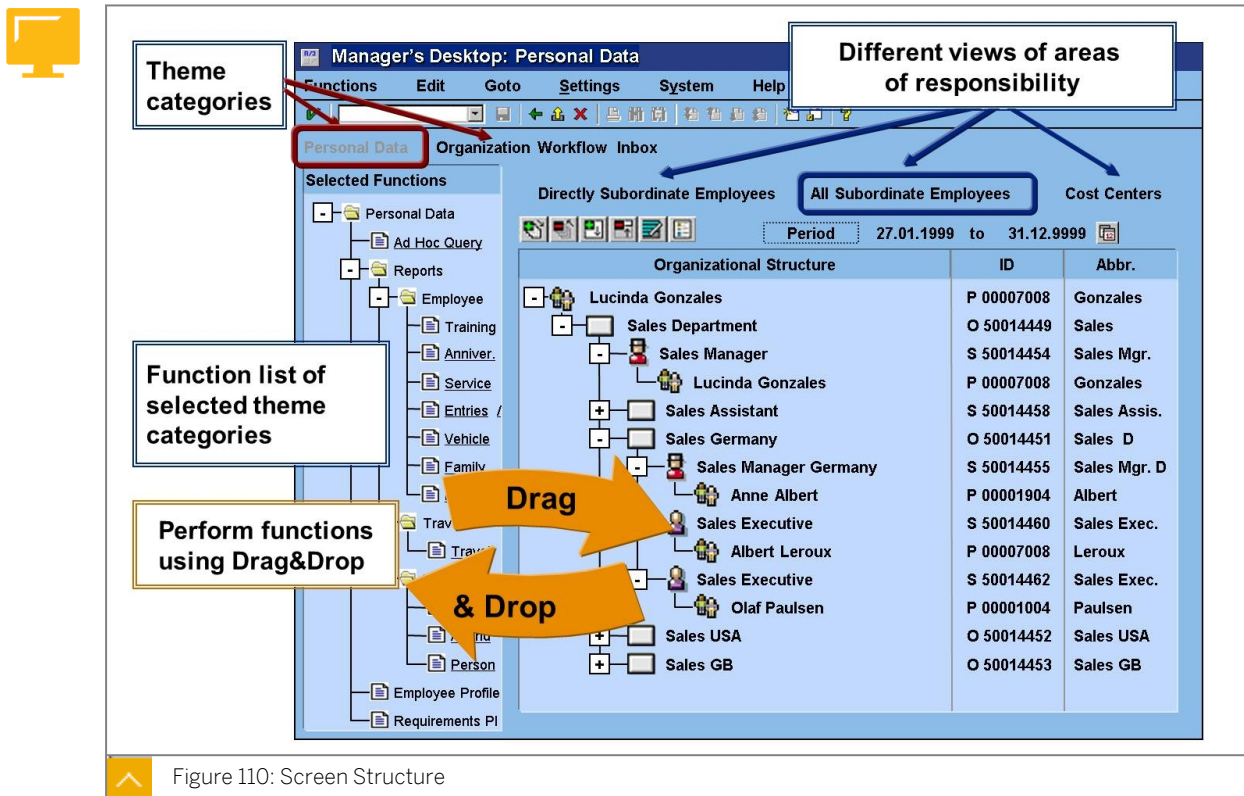
MDT offers a total of eight theme categories, each with its own function list. You can use function codes in Customizing to adjust these categories to suit the customer requirements. You can also add more functions to these categories.

Users can deactivate categories and functions that they do not need. Users can deactivate them from the initial screen and from other screens in the application. These settings are saved together with the user's profile, and are used each time the user logs on to the system. The user can switch between the user-specific settings and the standard settings at any time.

Additional individual requests or special information requirements can also be included. If you need to access particular Intranet or Internet pages frequently, you can access them easily by using the corresponding links.



## Screen Structure



The MDT screen is divided into the following parts:

- Right screen area

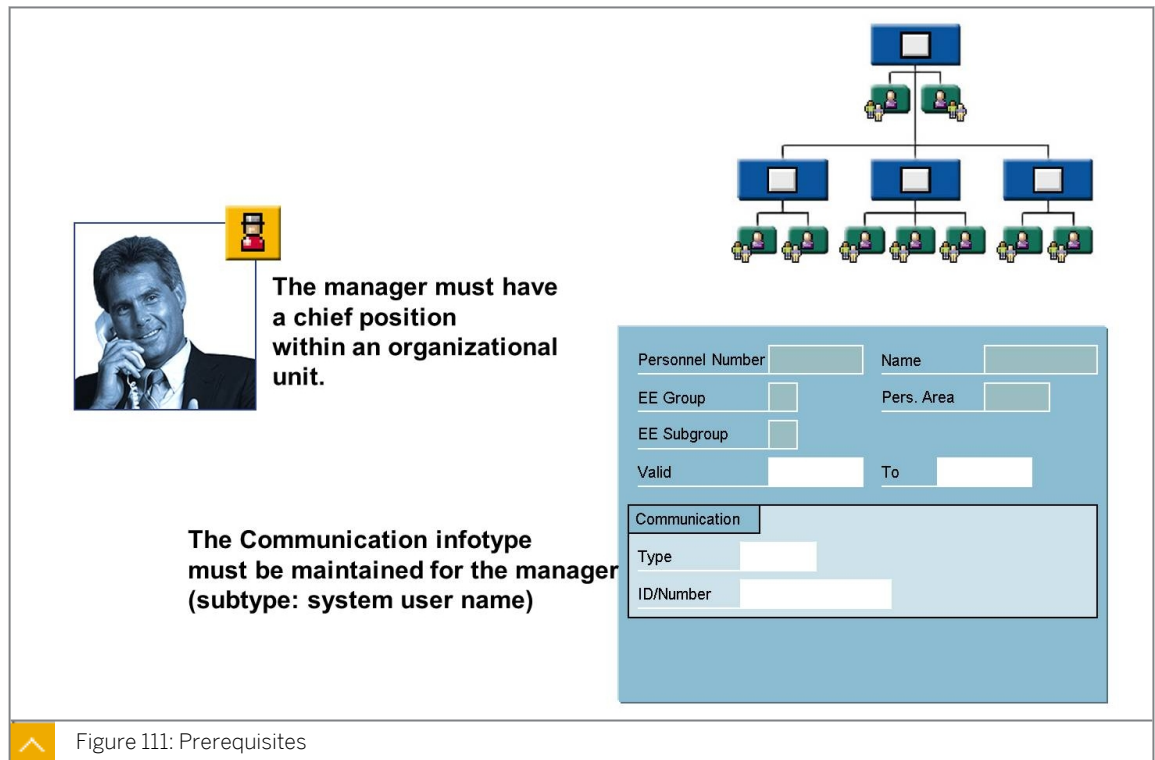
The right screen area displays your area of responsibility. The tab pages in the right screen area allow you to access different views (evaluation paths) of the organizational structure for your area of responsibility. Up to 12 tab pages can be assigned to each theme category.

- Left screen area

The left screen area displays the available functions in a function tree.



## Prerequisites for Using MDT



A prerequisite for using MDT is an organizational plan of your company. The organizational plan must include the organizational structure and the staff assignment. The staff assignment is the assignment of employees (persons) or users to positions in the Organizational Management (OM) component.

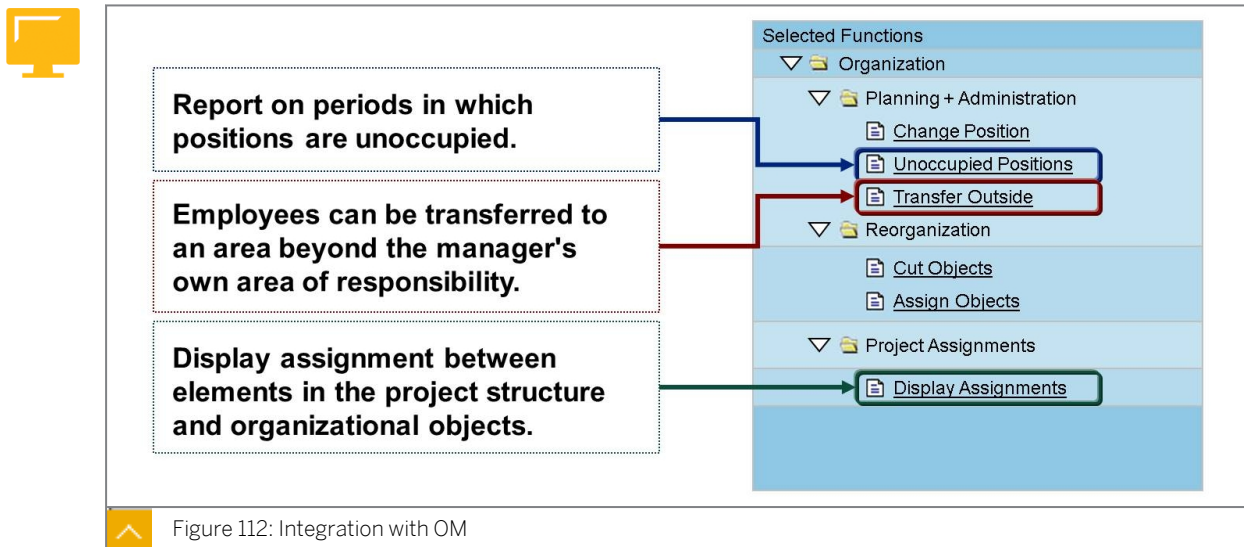
The manager must have a chief position within an organizational unit. The system uses the chief position indicator (relationship A/B012 between the position and the organizational unit) to determine the organizational units that are linked either directly or indirectly with the position holder.

To display corresponding cost centers, you must assign a cost center to the chief position or organizational unit.

The *Communication* infotype (IT0105) for a manager must be maintained with the system user name (subtype 0001) of the manager.



## Integration with OM



The functions of the organization theme category enable department heads to change organizational objects in their areas of responsibility. These functions also allow department heads to plan and initiate transfers.

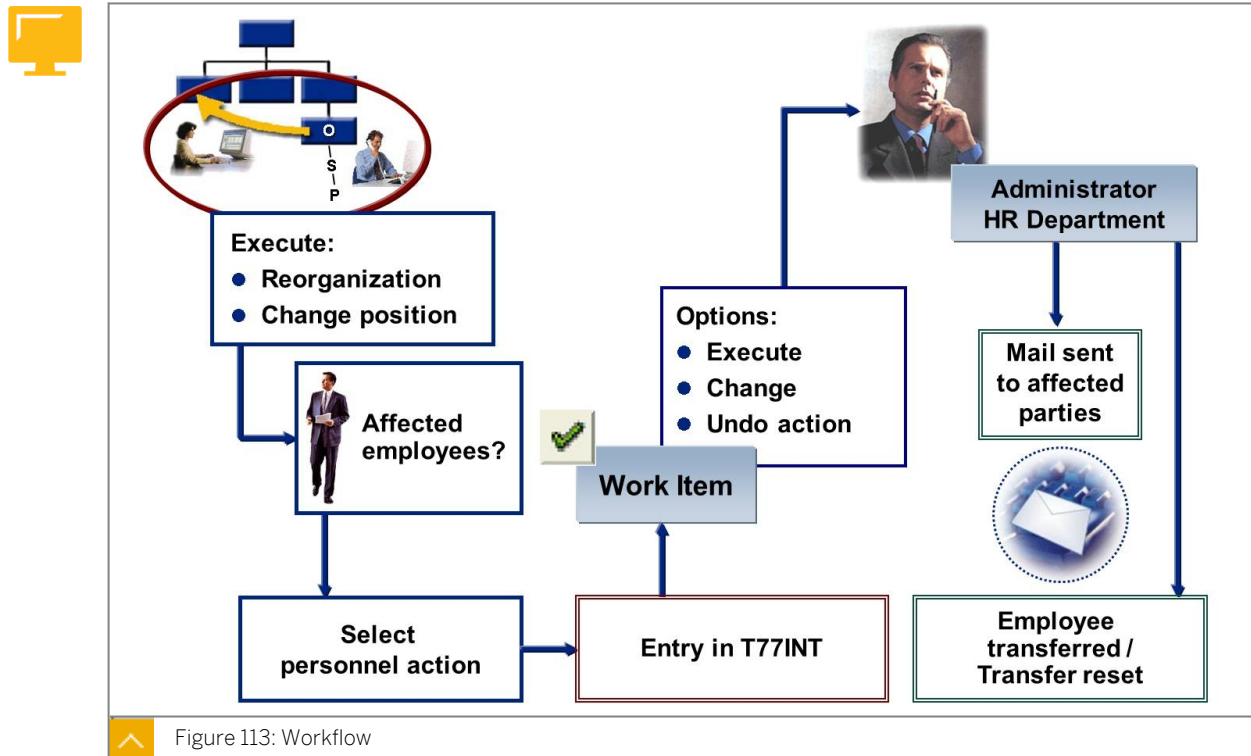
You can move organizational objects within the tree structure and move employees (persons) within your area of responsibility by using drag and drop. An employee can also be transferred to an area outside the manager's area of responsibility.

As soon as personal data (for example, IT0001) is affected by an action from MDT, the changes planned by the manager are first stored as a plan in MDT. A workflow is also started to the relevant HR administrator.

The HR administrator can then decide how to respond to the manager's proposal. The HR administrator can reject, change, or perform the action (that is, accept the manager's proposal). The employee's data is not changed in OM or in PA until the HR administrator has reached a final decision regarding the manager's proposal.



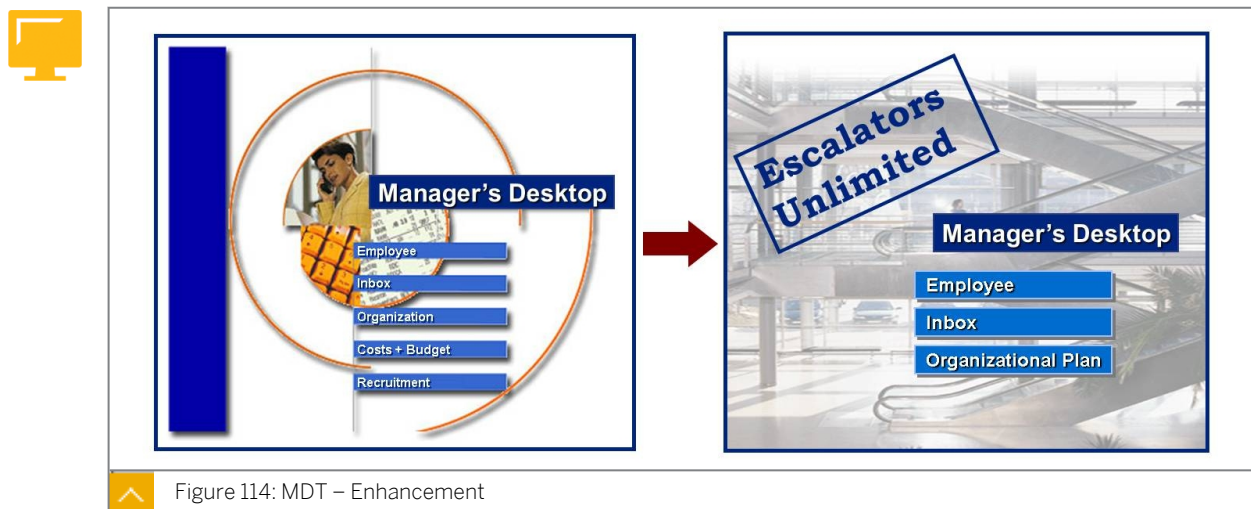
## Workflow



Integrated workflow support plays an important role in operations that are processed locally. Workflow ensures that employees in the HR department are seamlessly integrated in these processes.

For example, if an employee is to be transferred, the line manager starts the action by entering the basic data. The action later appears in the workflow inbox of the responsible HR administrator. The HR administrator takes over further processing and reports back to the manager and employee when the action has been completed. This communication is triggered according to the workflow.

## MDT – Enhancement





You can configure and enhance the functions and screen layout of MDT through general settings in the relevant sections in Customizing.

You can enhance the range of functions in MDT by using the Customizing wizard. Customizing enables you to insert your own background picture or the company logo, and enter your reports in the various function trees.



### **LESSON SUMMARY**

You should now be able to:

- Update the organizational structure using MDT



# Updating Information Using Manager Self-Service (MSS)

## LESSON OVERVIEW

This lesson shows you how to process organizational changes by using Manager Self-Service (MSS).

### Business Example

The management at your company needs a tool for making strategic decisions and performing daily tasks.

You plan to implement MSS and for this reason, you require the following knowledge:

- An understanding of MSS

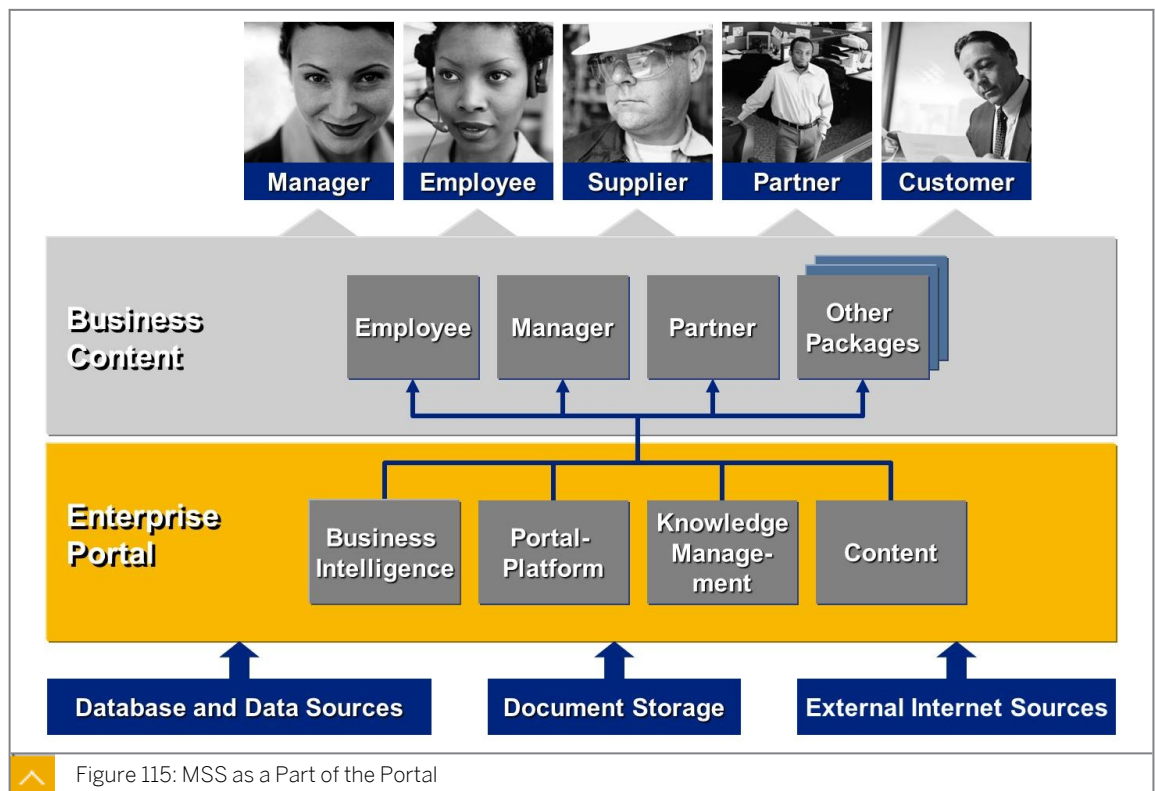


## LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Update position information using MSS

## Manager Self-Service (MSS)





The business package for MSS is an integral part of the SAP Enterprise Portal. A business package contains preconfigured content and functions that you can easily import into the SAP Enterprise Portal.

The SAP Enterprise Portal provides tools that enable you to change the content and tailor it to meet the requirements of your company without any extra programming.

### Overview of MSS

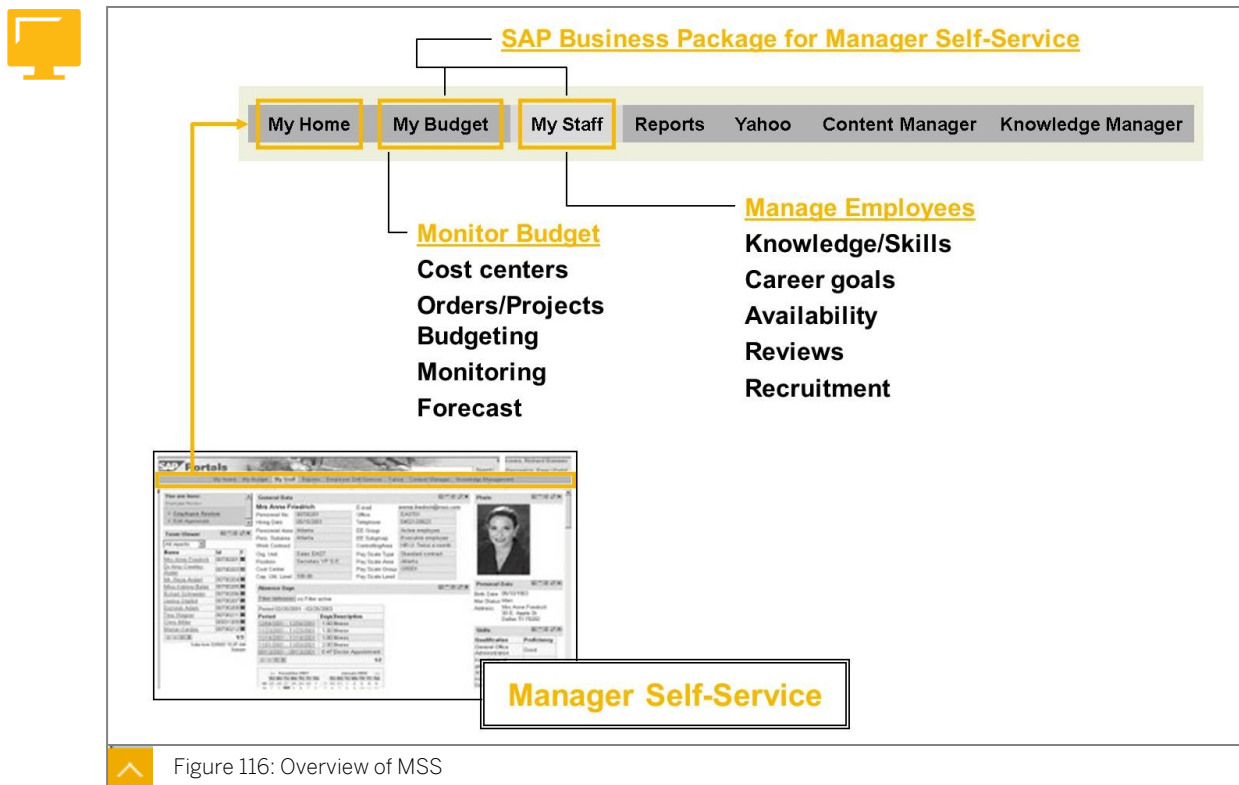


Figure 116: Overview of MSS

The business package for MSS supports line managers, project leaders, and team leaders by providing them with the relevant information when they perform their tasks. When they log on to the MSS portal and select the relevant page, managers who have personnel responsibility can access relevant information about their locations and employees. This enables managers to see who is at work or on leave.

Managers can trigger HR processes directly from the portal. For example, after an employee review, the manager can trigger a special payment for the employee.

MSS contains a wide variety of reporting options and evaluations that are based on standard SAP reports and SAP Business Warehouse (SAP BW) reports.



## Integration

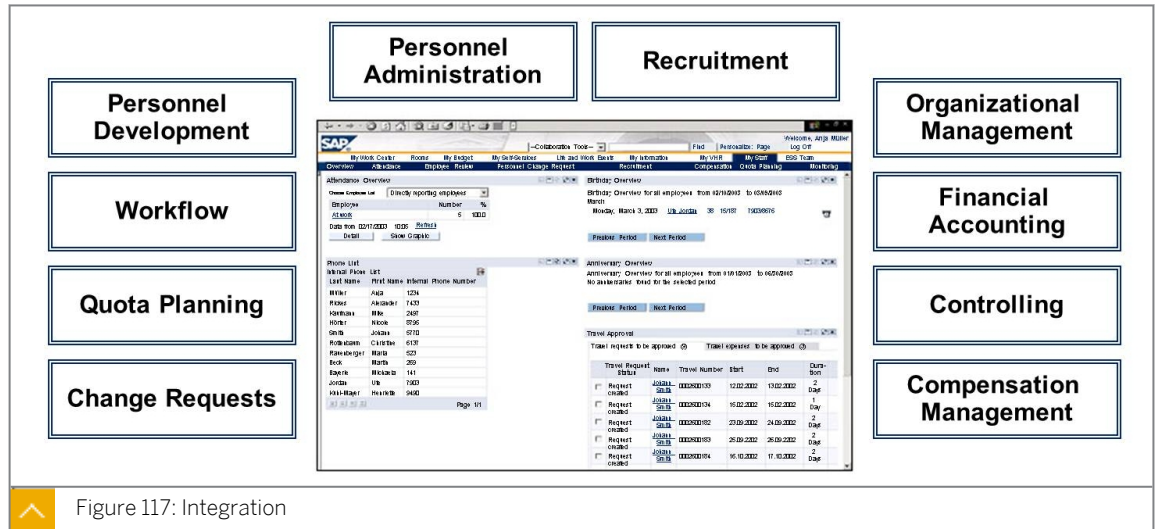


Figure 117: Integration

MSS is a cross-application component.

Under *My Staff*, managers can complete all the tasks relating to their personnel responsibility. Under *My Budget*, managers can complete all the tasks that arise from their responsibility for cost centers and profit centers.

### Integration with Personnel Administration (PA)

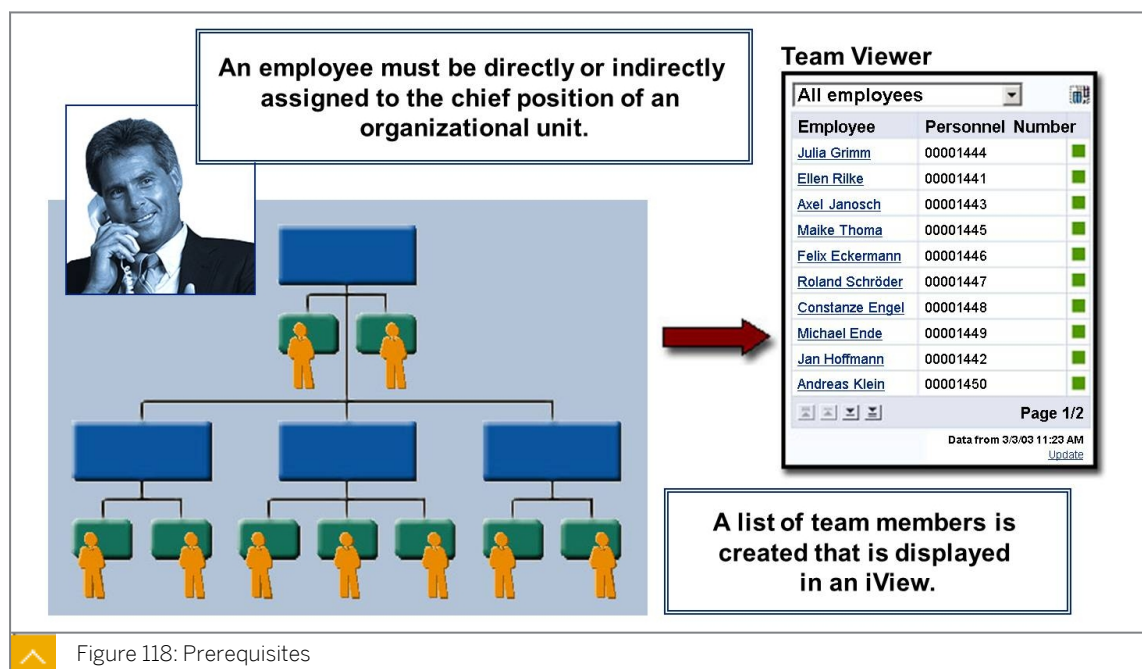
Integration between PA and Organizational Management (OM) must be active if you want to make transfers or change jobs or positions. If integration is not active, error messages are displayed.

### Workflow Support

Workflow ensures that employees in the HR department are seamlessly integrated in processes such as the leave request approval process.



## Prerequisites for Using MSS



An organizational plan of your company, including its organizational structure and staff assignment, is a prerequisite for using MSS. Staff assignment refers to the assignment of employees or users to positions in OM.

The manager must hold a chief position within an organizational unit. The system uses the chief position indicator (relationship A/B012 between the position and the organizational unit) to determine the organizational units that are related directly or indirectly to the position holder.

To display the corresponding cost centers, you must assign a cost center to the chief position or organizational unit.

The *Communication* infotype (IT0105) for a manager must be maintained with the system user name (subtype 0001) of the manager.



## Worksets and Functions

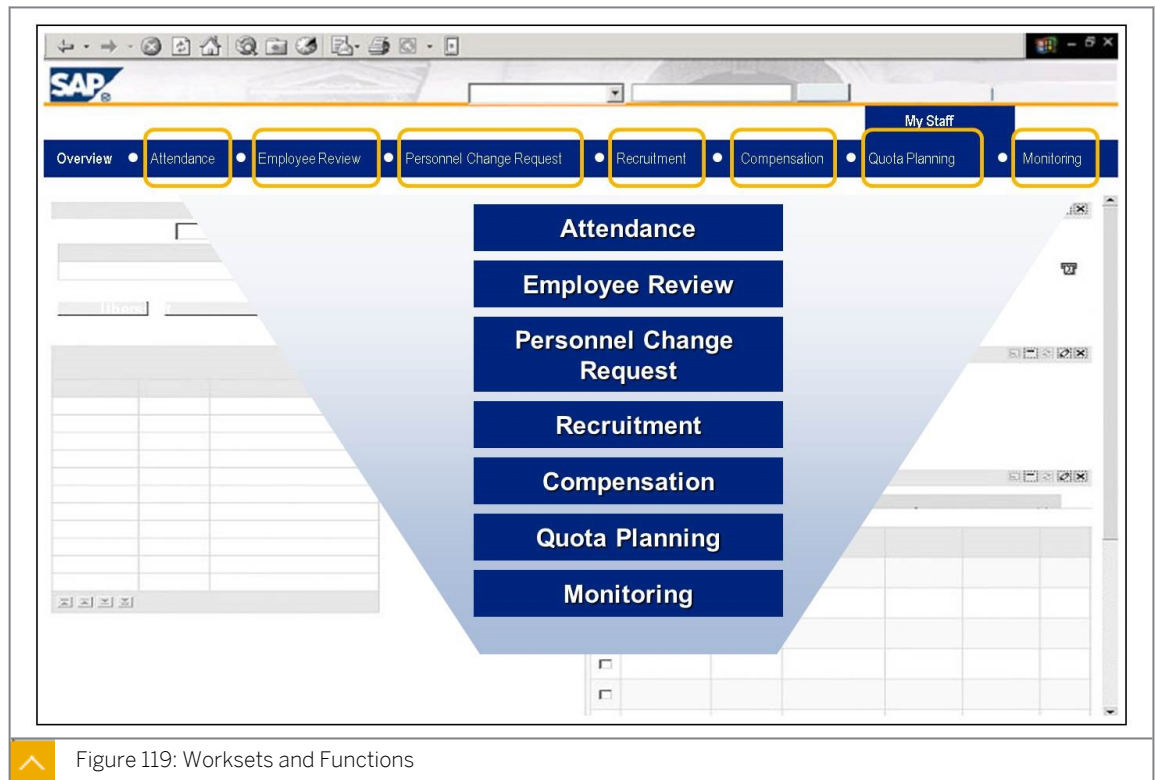


Figure 119: Worksets and Functions

Worksets are packages that contain tools and content for specific business scenarios, such as employee reviews. Worksets organize a business package into different packages according to the various task areas.

### Worksets include the following components:

- iViews (presentation elements)
- Standards SAP reports and SAP BW reports
- Links to internal or external information (for example, the Internet)

You can tailor worksets to suit the requirements of your company.



## Navigation



**Team Viewer**

All employees

Employee	Personnel Number
Julia Grimm	00001444
Ellen Rilke	00001441
Axel Janosch	00001443
Malke Thoma	00001445
Felix Eckermann	00001446
Roland Schröder	00001447
Constanze Engel	00001448
Michael Ende	00001449
Jan Hoffmann	00001442
Andreas Klein	00001450

Page 1/2  
Data from 3/3/03 11:23 AM  
Update

**General data**

**Absence days**

**Qualifications**

**Personal data**

Figure 120: Navigation

The Team Viewer is the central navigation element in MSS. It lists all employees that report to the manager directly or indirectly. To keep the data up-to-date, iViews communicate with one another.

## Integration of MSS and OM



**SAP Business Client**

**Team Calendar**

Display: All Employees | New | Month | January | 2014 | Apply | Sort by: Names Ascending | Select Team Members | Print Team Calendar

**Select Employee: Step 1 (Select Employee) - Microsoft Internet Explorer provided by SAP-Hosting**

Select Employee: Step 1 (Select Employee)

1 Select Employee | 2 Select Process | 3 Fill Out Form | 4 Review and Send

Employee Selection: Direct Reports

Display: Organizational Information

**Employee Details**

Name	Personnel Number	Position	Staffing Ratio	Organizational Unit
Ruth Cabrera	25599100	00 Senior Product Designer	100,00	00 Production
Tom Bender	25501200	00 Production Worker A	100,00	00 Production
Ellen Rilke	25501300	00 Production Worker B	100,00	00 Production
Anja Müller 00	25501400	00 Production Worker B	100,00	00 Production
Seamus O'Brian	25599500	00 Lead Service Center	100,00	00 Service Center

Figure 121: Object and Data Provider in Manager Self-Service

Manager Self Service contains many services where the first step is for the manager to display all or part of their team before selecting an employee to view or process in some way.

In the figure Object and Data Provider in Manager Self-Service, both the *Team Calendar* and the *Start Processes for Employees* services contain an *Employee selection* facility at the top of the screen. This is known technically as an *Organizational View*.

Standard *Organizational Views* include the following:



- **Directly Subordinate Employees:** Employees are listed
- **Employees from Organizational Structure:** The organizational structure is displayed for selection. The relationships and levels are visible.
- **Employees from Organizational Units:** The organizational units are presented in a list for selection. The relationships and levels are not visible.
- **Employee Search:** Search facility based on field entry.

Two of the organizational views allow managers to navigate to a specific organizational unit or units before displaying the relevant employees.

Once an organizational view is chosen, one or more displays listing the employees are available for selection. The functionality to select and display employees in this way is known as an *Object and Data Provider (OADP)*. From an *Organizational Management* perspective this is important because evaluation paths are one of the two tools, along with function modules, used to find the correct organizational units, positions and people.

### Evaluation paths specific to Manager's Self-Service

Depending on the *Organizational View* selected, two or three evaluation paths may be required.

For the directly subordinate employee views (views without a navigation area), only two evaluations are required:

- The first evaluation determines the root object (the organizational unit).
- The second evaluation determines the objects that are to be displayed (the employees).

Views with a navigation area (for example the selection of an organizational unit), require a third evaluation path. This path is used to display the root organizational unit and those below. This only displays O-O relationships and organizational units for selection. When an organizational unit is selected, the second evaluation path is then used to display the person objects.

The evaluation path used by *OADP* to select objects include the following:

- The first evaluation path determines the organizational unit(s) for which the manager is responsible. These organizational units are then used as the root objects for the second evaluation path. This first evaluation path travels up the organizational structure.
- The second evaluation path starts with the found organizational unit(s) of the first evaluation path, and works downward to determine the employees that are to be displayed for the navigation area. This evaluation path may contain limits on the number levels it travels down the organizational structure.



## Root Object Managers Organizational Unit

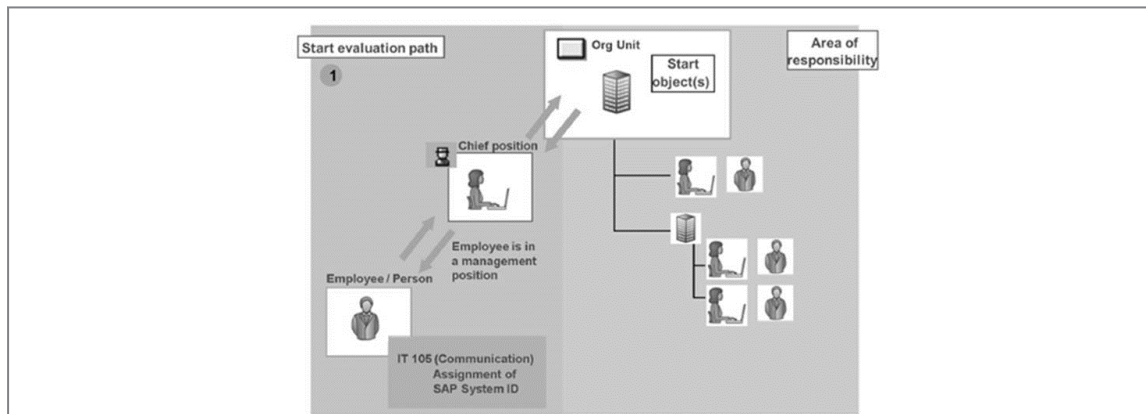


Figure 122: Root Object Managers Organizational Unit

The organizational structure unit found by the first evaluation path is used as the basis for a second evaluation, which selects all of the objects for the navigation area. For example, the second evaluation path (O-O) selects organizational units. These organizational units can be shown in the navigation area as a list or structure view.

When the user selects an organizational unit in the navigation area, the objects for the *Data View* area are selected using the third evaluation path.

The evaluation path SAP\_MANG provides the organizational units you, as a manager, manage.

## Other Worksets

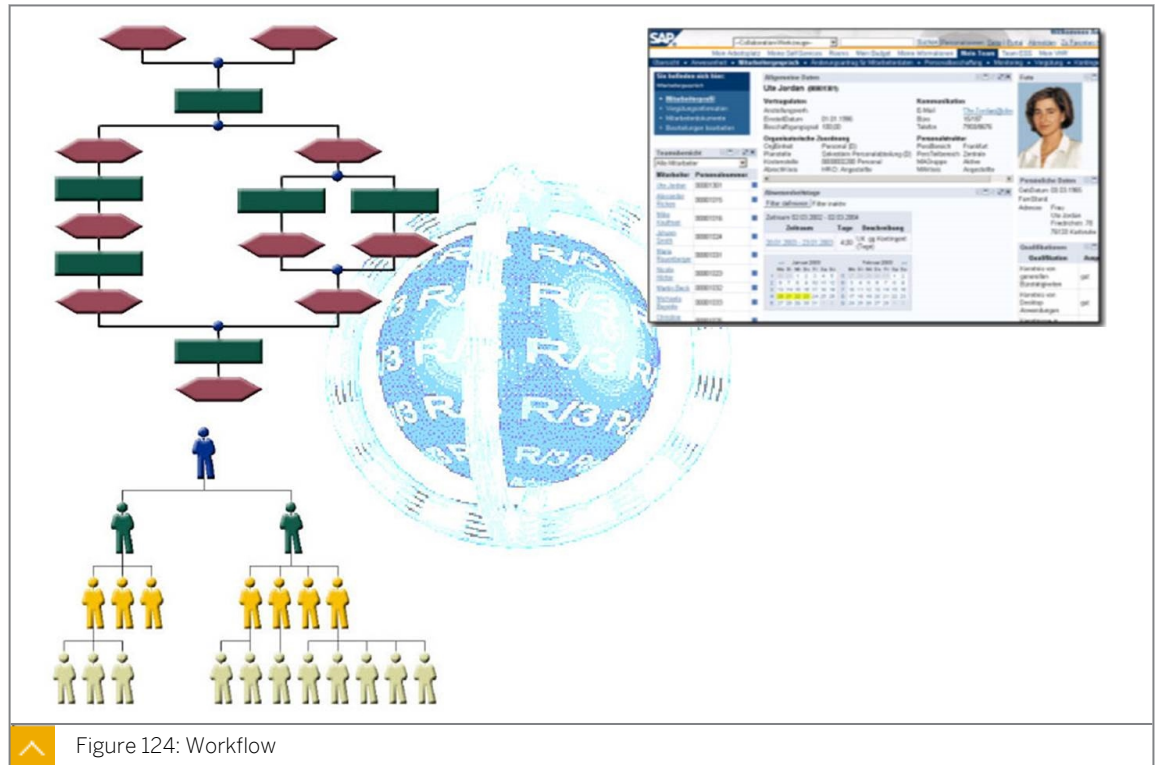


Figure 123: Other Worksets

The Other Worksets figure displays examples of worksets available in MSS.



## Workflow



MSS functions, in particular change requests, are integrated with SAP Business Workflow, which facilitates optimization of processes.



## LESSON SUMMARY

You should now be able to:

- Update position information using MSS







## Learning Assessment

1. What are the prerequisites for using Manager's Desktop (MDT)?

*Choose the correct answers.*

- ☐ A Organizational plan
- ☐ B Cost Center
- ☐ C Communication infotype (0105) mapped with Manager's SAP user ID
- ☐ D Manager's position has to be made as "Chief" of the organizational unit

2. Manager's Desktop (MDT) brings together cross-application functions that allow the line managers' immediate access to relevant HR data through \_\_\_\_\_.

*Choose the correct answer.*

- ☐ A Theme categories
- ☐ B Integration
- ☐ C Customization
- ☐ D Function list

3. Which of the following activities can be performed in the customizing wizard in Manager's Desktop (MDT)?

*Choose the correct answers.*

- ☐ A Insert background pictures
- ☐ B Add or remove functions to theme categories
- ☐ C Initiate transfers
- ☐ D Enter reports in various function trees



4. In the organization theme category, you can move organizational objects within the tree structure and employees within your area of responsibility by dragging and dropping.

*Determine whether this statement is true or false.*

☐ True

☐ False

5. Which of the following does the business package for Manager Self-Service (MSS) support?

*Choose the correct answers.*

☐ A Line managers

☐ B Employees

☐ C Project leaders

☐ D Team leaders

6. Team viewer is a central navigation element in Manager Self-Service (MSS) that lists all employees that report to the manager, directly or indirectly.

*Determine whether this statement is true or false.*

☐ True

☐ False

7. Worksets organize a business package into different packages according to the task area.

*Determine whether this statement is true or false.*

☐ True

☐ False



### Learning Assessment - Answers

1. What are the prerequisites for using Manager's Desktop (MDT)?

*Choose the correct answers.*

- ☒ A Organizational plan
- ☐ B Cost Center
- ☒ C Communication infotype (0105) mapped with Manager's SAP user ID
- ☒ D Manager's position has to be made as "Chief" of the organizational unit

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- ☒ B Add or remove functions to theme categories
- ☐ C Initiate transfers
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5. Which of the following does the business package for Manager Self-Service (MSS) support?

*Choose the correct answers.*

☒ A Line managers

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☒ D Team leaders

6. Team viewer is a central navigation element in Manager Self-Service (MSS) that lists all employees that report to the manager, directly or indirectly.

*Determine whether this statement is true or false.*

☒ True

☐ False

7. Worksets organize a business package into different packages according to the task area.

*Determine whether this statement is true or false.*

☒ True

☐ False



## UNIT 9

# Data Model Enhancements in Organizational Management

### Lesson 1

Outlining the OM Data Model

173

### Lesson 2

Modifying the Data Model

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### Lesson 3

Creating Relationships

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### Lesson 4

Creating Evaluation Paths

181

### UNIT OBJECTIVES

- Outline the OM data model to enable consistent data creation
- Add objects to an organizational structure
- Create relationships between objects to accurately depict the organizational structure
- Create evaluation paths to facilitate reporting on organizational structures







## Outlining the OM Data Model

### LESSON OVERVIEW

This lesson describes the Organizational Management (OM) data model.

### Business Example

Your organization has implemented Human Capital Management (HCM) with all its components. You notice that the standard object types and relationships in OM are not sufficient to depict your personnel development. You therefore decide to review the data model in OM. For this reason, you require the following knowledge:

- An understanding of the data model

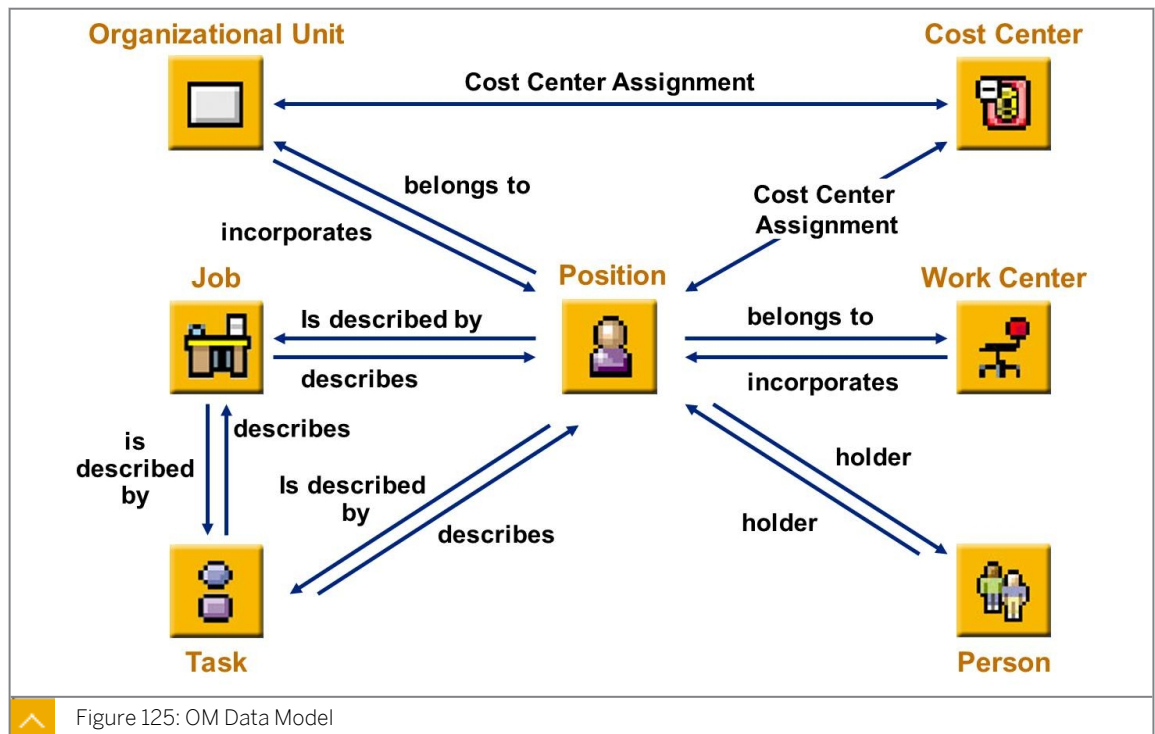


### LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Outline the OM data model to enable consistent data creation

### OM Data Model



The OM data model for Personnel Planning defines all the object types in table T7780. Each organizational object is restricted by the allowed relationships of its object type.



You can use object-oriented design like building blocks to depict your organizational plan in the system with the common object types and their relationships. Sometimes, however, if the standard delivered system is not sufficient to meet the business requirements of an organization, you can enhance the existing data model.

## Personnel Planning Customizing Tables



The following table illustrates some of the Customizing tables that are used for Personnel Planning:

Table	Content
T778O / T777O	Object types
T77EO	External object types
T778V / T777V	Display links
T777E	Allowed relationships
T77AR	Additional relationship information
T777Z	Infotype time constraint
T778T / T777T	Infotypes
T777I	Infotypes per object
T778U / T777U	Subtypes
T77ZR	Definition of Time Constraint depending on target object type



Note:

You can access the individual tables in Customizing, by choosing *Personnel Management* → *Organizational Management* → *Basic Settings* → *Data Model Enhancement*.



Some of the consistency checks and parameters are listed in the following table:

Consistency Checks	Parameters
Infotypes or Additional data	Object type assignment
	Time constraint
	Structures
	Database tables
Display Links	Allowed relationships
	Time constraint
Integration	Active or inactive
	Active plan version



The report RHCHECKO checks the consistency of Customizing in the data model.

**LESSON SUMMARY**

You should now be able to:

- Outline the OM data model to enable consistent data creation







## Modifying the Data Model

### LESSON OVERVIEW

This lesson shows how to enhance the existing data model by adding a new object.

### Business Example

Your company has implemented Human Capital Management (HCM) with all its components. You notice that the standard object types and relationships in Organizational Management (OM) are not sufficient to depict your personnel development model. You decide to enhance the existing data model in OM. For this reason, you require the following knowledge:

- An understanding of the data model in OM



### LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Add objects to an organizational structure

### Object Type Creation



The screenshot displays two SAP S/4HANA windows. The background window is titled 'Display View "Object Types": Overview' and contains a table with columns: O, Object type text, OrgObj type, Icon name, and B. The table lists various object types such as '30 30 Training Group (HR505)', '99 Implementations', 'A Work Center', 'AC Rule', 'AG Role', 'AP Applicant', 'B Development Plan', 'BA Appraisal', 'BG Criteria Group', 'BK Criterion', 'BL Development Plan Group', 'BP Business Partner', 'BS Appraisal Model', 'BU Budget Structure Element', and 'C Job'. A yellow box labeled 'T7780' is positioned over the top right of this window. The foreground window is titled 'Change View "Infotypes": Overview' and contains a 'Dialog Structure' tree on the left with 'Infotypes' selected, and a table on the right with columns: Infotyp. and Infotype Name. The table lists infotypes from 1000 to 1014, including 'Object', 'Relationships', 'Description', 'Department/Staff', 'Character', 'Planned Compensation', 'Restrictions', 'Vacancy', 'Acct. Assignment Features', 'Health Examinations', 'Authorities/Resources', 'Work Schedule', 'Employee Group/Subgroup', and 'Obsolete'. A yellow box labeled 'T777I' is positioned over the top right of this window.

Figure 126: New Object Types

You can create object types, assign them characteristics in the form of infotypes, and link them to each other or to existing object types with your own relationships.



Object types are defined in table T778O by a two-character CHAR string. The namespace A\*-Z\* is reserved for SAP; 0\*-9\* is for customers.

With regard to the origin of the master record, there is a technical distinction between internal and external object types.

**The difference between the object types is as follows:**

**Internal object types:**

With this object type, the master records are stored in database tables belonging to Personnel Planning (for example, organizational units, positions, and jobs).

**External object types:**

With this object type, the master records are stored in database tables belonging to other SAP applications (for example, cost centers). In Personnel Planning, the system refers to these external objects by using relationships. To define an external object type, you must create an interface program (for example, model RHPRELOO and an entry in table T77EO).

You can see the tables for enhancing the data model in Customizing, by choosing *Personnel Management* → *Organizational Management* → *Basic Settings* → *Data Model Enhancement* → *Maintain Object Types*.

All information about objects is saved in the system in the form of infotypes, in particular the object itself or its master record and its relationships.

**Important Infotypes for Object Types**

The *Object* infotype (1000) and the *Relationships* infotype (1001) are the central Personnel Planning infotypes. Infotype 1000 defines the existence of an object in the system.

All object types must have at least infotypes 1000 and 1001 to exist.

The infotypes are defined in table T778T. In table T777I, you can maintain the infotypes that are allowed for an organizational object.

Usually, you create new objects by using the *Object* infotype (1000), and then specify the relationships between the objects in the *Relationships* infotype (1001). You must maintain the *Object* infotype (1000) before you can maintain the other Personnel Planning infotypes.



**LESSON SUMMARY**

You should now be able to:

- Add objects to an organizational structure



## Creating Relationships

### LESSON OVERVIEW

This lesson explains how to set up a relationship between a newly created object and the organizational structure.

### Business Example

Your organization has implemented Human Capital Management (HCM) with all its components. You notice that the standard object types and relationships in Organizational Management (OM) are not sufficient to depict your personnel development concept. Therefore, you decide to set up a relationship for a newly created object and ensure it is correctly linked to the organizational structure. For this reason, you require the following knowledge:

- An understanding of relationships between objects

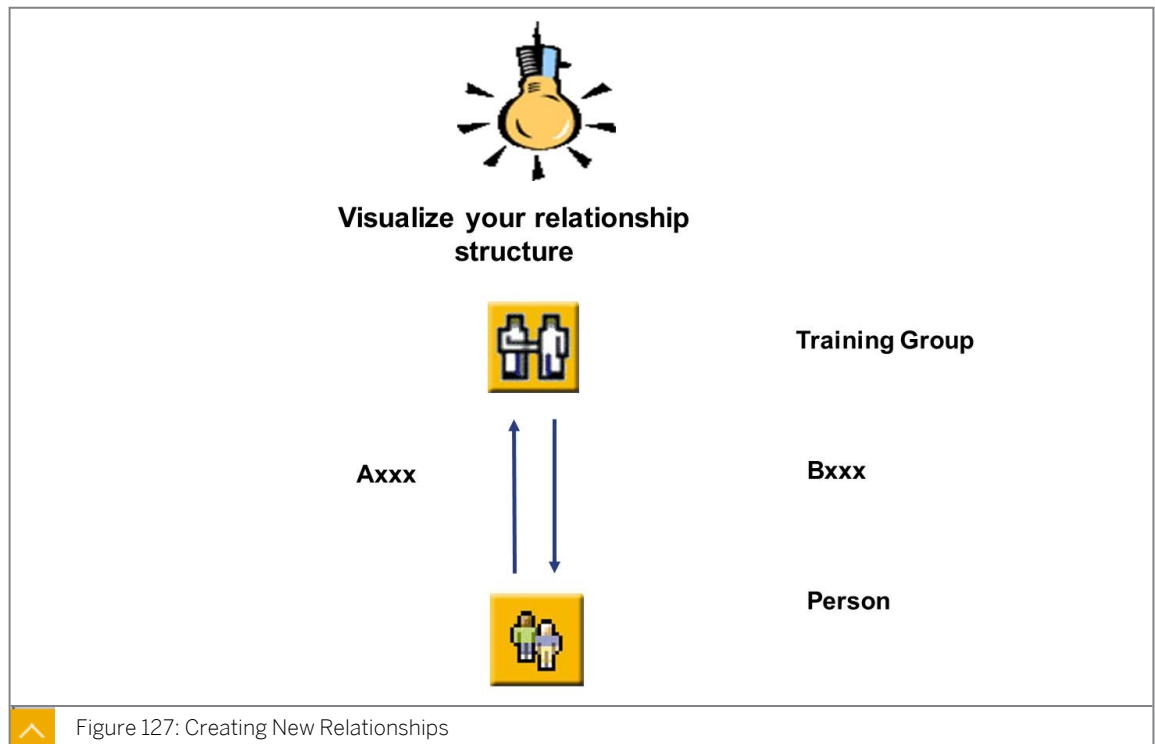


### LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Create relationships between objects to accurately depict the organizational structure

### Object Relationships





You can define links between the individual object types in the system by using relationships.

Relationships are generally defined in the following directions:

- A = bottom up
- B = top down

However, this convention is a non-mandatory suggestion when you set up the relationship. It is important that you do not change or invert the direction of a relationship at a later stage.

Relationships are defined in table T778V by a three-character CHAR string.



Note:

In table TRESK, the namespace is delimited as follows:

- SAP: ,000' - ,999'
- Customer 'A\*\*' - 'Z\*\*'



### LESSON SUMMARY

You should now be able to:

- Create relationships between objects to accurately depict the organizational structure



## Creating Evaluation Paths

### LESSON OVERVIEW

This lesson explains how to set up new evaluation paths.

### Business Example

Your organization has implemented Human Capital Management (HCM) with all its components. You notice that the standard object types and relationships in organizational management are not sufficient to depict your personnel development model. Therefore, you decide to create evaluation paths. For this reason, you require the following knowledge:

- An understanding of evaluation paths



### LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Create evaluation paths to facilitate reporting on organizational structures

### Evaluation Paths

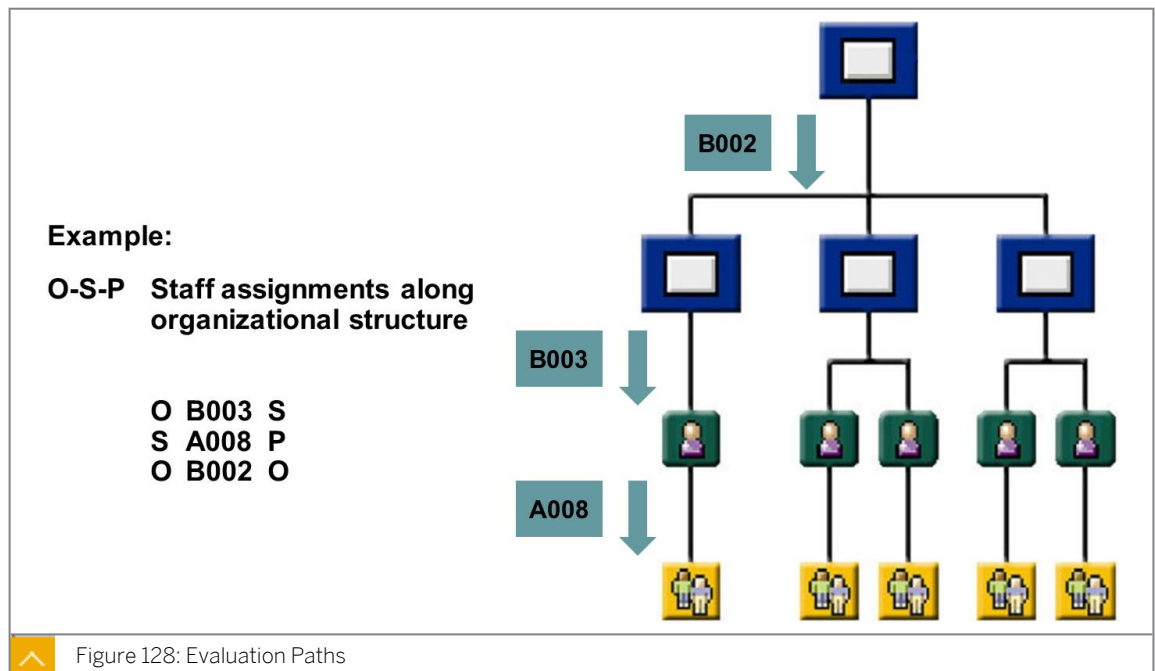


Figure 128: Evaluation Paths

An evaluation path represents a chain of relationships that exists among certain object types. It defines the relationships with which a structure is created. Objects can have several relationships. Consequently, not all of an object's relationships are displayed in one view.

For example, to display the staff assignment along with the organizational structure (evaluation path O-S-P), you start with the organizational unit (O) and determine the



relationships to the positions (S). When you start from these positions, you can determine the holders of the positions or the persons (P). After this cycle is complete, you progress to a subordinate organizational unit where you start the cycle again.

Cost centers and their relationships to organizational units are not displayed for this evaluation path.

### Evaluation Paths: Search



Object Type

Object ID

Name

Evaluation Path

Editing Period  to

**Evaluation Path**

Find evaluation paths that contain relationships between the following object types:

From

Via

To

Figure 129: Finding Evaluation Paths

You can use the object types you know to search for existing evaluation paths. To help you choose the correct evaluation path, the *General Structures* interface allows you to use the F4 help to specify up to three object types that exist in the evaluation path as selection criteria. You can then enter the objects you want to find in the evaluation path as the selection criteria.

When you access the *General Structures* interface, you can also generate temporary evaluation paths.



## Creation of Evaluation Paths

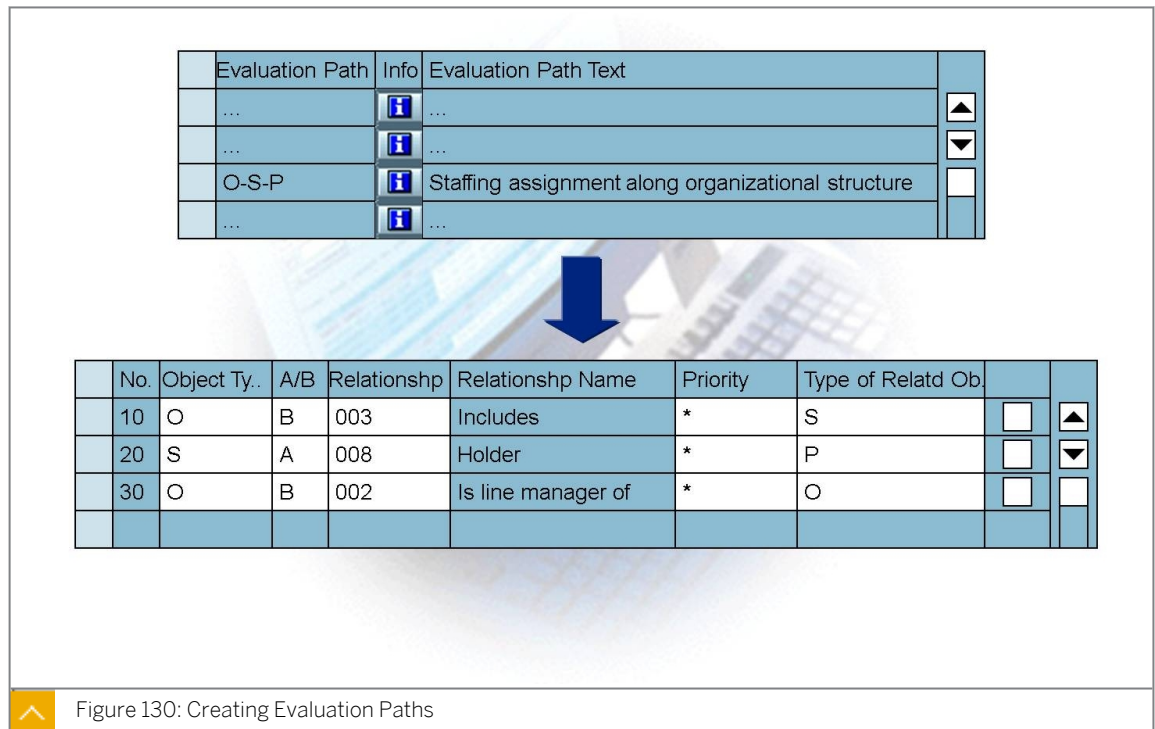


Figure 130: Creating Evaluation Paths

You can create evaluation paths in Customizing for Organizational Management under *Basic Settings*.

One or more relationships form the navigation paths for an evaluation. These relationships enable you to report on and display structural information (for example, the organizational plan or the reporting structure).

In the *Skip* field in individual maintenance, you can specify that a particular navigation path is to be evaluated and the result is not to be displayed.

You can create alphanumeric evaluation paths with a maximum of eight characters. The first letter is Z.

If you prefer not to use a standard SAP evaluation path for reports that use an internal evaluation path, you can specify the alternative evaluation path in the *Value Abbr.* column.



### Caution:

Do not change an existing evaluation path unless it is an evaluation path you have created yourself. These changes affect all programs and reports that might use the evaluation path that you have changed in the background. Any changes you make could lead to system problems.



## LESSON SUMMARY

You should now be able to:

- Create evaluation paths to facilitate reporting on organizational structures







## Learning Assessment

1. \_\_\_\_\_ can be used as building blocks to depict your organizational plan in the system.

*Choose the correct answer.*

- ☐ A Infotypes
- ☐ B Object-oriented design
- ☐ C Relationships
- ☐ D Organizational units

2. If the standard object types and relationships in Organizational Management (OM) are not sufficient to meet the business requirements of an organization, you can enhance the existing data model.

*Determine whether this statement is true or false.*

- ☐ True
- ☐ False

3. Which of the following are kinds of object types?

*Choose the correct answers.*

- ☐ A Internal
- ☐ B Essential
- ☐ C External
- ☐ D Temporary

4. Each object type has its own object type key.

*Determine whether this statement is true or false.*

- ☐ True
- ☐ False



5. The object type namespace A\*-Z\* is reserved for \_\_\_\_\_.

*Choose the correct answer.*

- ☐ A Customers
- ☐ B SAP
- ☐ C Users
- ☐ D Administrators

6. The \_\_\_\_\_ and the \_\_\_\_\_ are the central Personnel Planning infotypes.

*Choose the correct answers.*

- ☐ A Object infotype (1000)
- ☐ B Description infotype (1002)
- ☐ C Character infotype (1004)
- ☐ D Relationships infotype (1001)

7. \_\_\_\_\_ can be used to define links between the individual object types in the system.

*Choose the correct answer.*

- ☐ A Infotypes
- ☐ B Relationships
- ☐ C Master records
- ☐ D Organizational units

8. Relationships are defined by a \_\_\_\_\_ CHAR string.

*Choose the correct answer.*

- ☐ A two-character
- ☐ B one-character
- ☐ C three-character

9. You can change or invert the direction of a relationship at a later stage.

*Determine whether this statement is true or false.*

- ☐ True
- ☐ False



10. An evaluation path represents a chain of relationships that exists among certain object types.

*Determine whether this statement is true or false.*

☐ True

☐ False

11. You can create alphanumeric evaluation paths with a maximum of \_\_\_\_\_ characters.

*Choose the correct answer.*

☐ A 2

☐ B 8

☐ C 6

☐ D 4

12. Which field in individual maintenance allows you to specify that a particular navigation path is evaluated, but that the result is not displayed?

*Choose the correct answer.*

☐ A Object ID

☐ B Relationship

☐ C Skip

☐ D Priority

13. If you change an existing evaluation path, it could lead to system problems.

*Determine whether this statement is true or false.*

☐ True

☐ False



### Learning Assessment - Answers

1. \_\_\_\_\_ can be used as building blocks to depict your organizational plan in the system.

*Choose the correct answer.*

- ☐ A Infotypes
- ☒ B Object-oriented design
- ☐ C Relationships
- ☐ D Organizational units

2. If the standard object types and relationships in Organizational Management (OM) are not sufficient to meet the business requirements of an organization, you can enhance the existing data model.

*Determine whether this statement is true or false.*

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- ☐ False

3. Which of the following are kinds of object types?

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- ☒ C External
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- ☐ False



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*Choose the correct answer.*

- ☐ A Customers
- ☒ B SAP
- ☐ C Users
- ☐ D Administrators

6. The \_\_\_\_\_ and the \_\_\_\_\_ are the central Personnel Planning infotypes.

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7. \_\_\_\_\_ can be used to define links between the individual object types in the system.

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- ☐ C Master records
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8. Relationships are defined by a \_\_\_\_\_ CHAR string.

*Choose the correct answer.*

- ☐ A two-character
- ☐ B one-character
- ☒ C three-character



9. You can change or invert the direction of a relationship at a later stage.

*Determine whether this statement is true or false.*

- ☐ True  
☒ False

10. An evaluation path represents a chain of relationships that exists among certain object types.

*Determine whether this statement is true or false.*

- ☒ True  
☐ False

11. You can create alphanumeric evaluation paths with a maximum of \_\_\_\_\_ characters.

*Choose the correct answer.*

- ☐ A 2  
☒ B 8  
☐ C 6  
☐ D 4

12. Which field in individual maintenance allows you to specify that a particular navigation path is evaluated, but that the result is not displayed?

*Choose the correct answer.*

- ☐ A Object ID  
☐ B Relationship  
☒ C Skip  
☐ D Priority

13. If you change an existing evaluation path, it could lead to system problems.

*Determine whether this statement is true or false.*

- ☒ True  
☐ False



## UNIT 10

# Hierarchy Framework in Organizational Management

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### UNIT OBJECTIVES

- Customize the object manager
- Add search nodes to the structure to enable customized searches
- Outline the configuration of column groups and ensure appropriate screen views are available
- Customize the overview of objects on the *Organization and Staffing* interface by using structural overview objects







## Customizing the Hierarchy Framework of the Organization and Staffing interface

### LESSON OVERVIEW

This lesson shows you how to customize the hierarchy framework on the Organization and Staffing Interface.

#### Business Example

Your company has decided that the new personnel development concept with training groups needs to be represented on the Organization and Staffing interface in the hierarchy framework. This will allow a better overview of the assignments of employees to the training groups. For this reason, you require the following knowledge:

- An understanding of customizing the hierarchy framework on the Organization and Staffing Interface

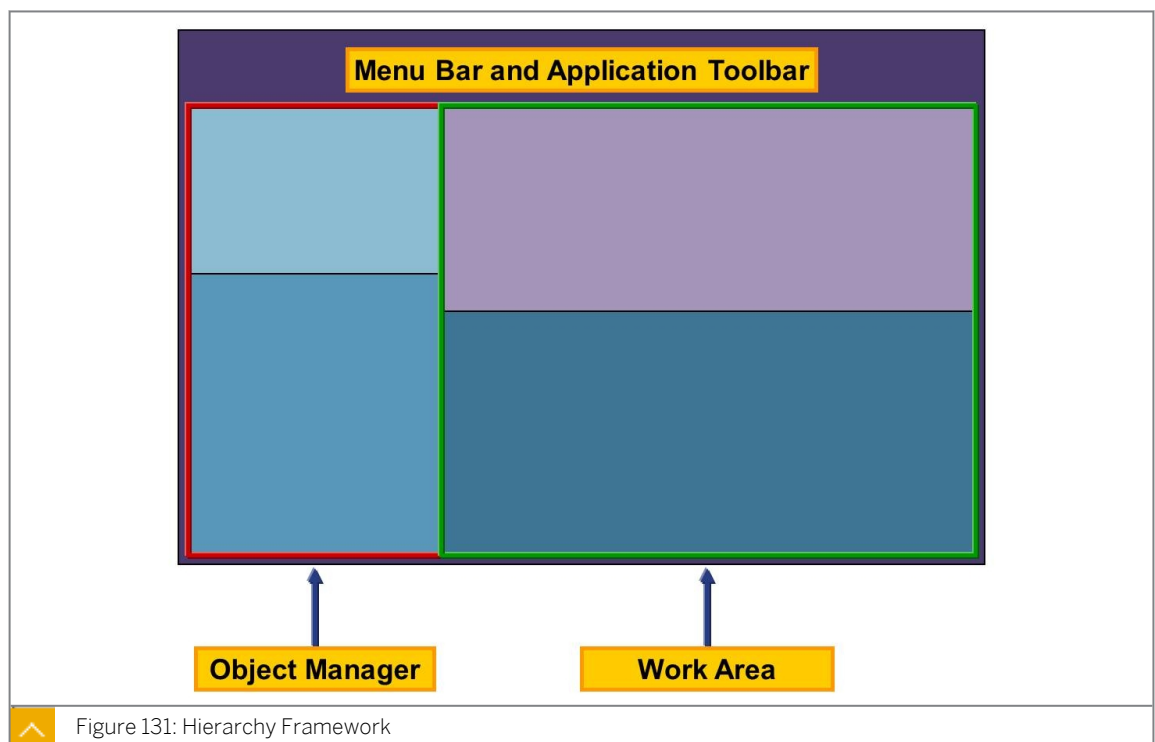


### LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Customize the object manager

### Hierarchy Framework of the Organization and Staffing Interface





The hierarchy framework is a Basis development that helps you to program applications for visualizing and modifying hierarchical structures and objects. It provides a framework for displaying hierarchical structures like the ones you create in Organizational Management (OM).

**The interface layout of an application created by using the hierarchy framework, for example the *Organization and Staffing* interface, is divided into the following screen areas:**

**Object Manager:**

The area on the left of the screen is called the object manager and always consists of a search area and a selection area.

**Work Area:**

The area on the right of the screen is called the work area. It is built in a specific way for each application. The *Organization and Staffing* interface is divided into the overview area and the detail area.

The menu bar and the application toolbar are above the object manager and the work area.

**User Parameters for Displaying the Basic Technical Names**

If you want to display the basic technical names of the individual screen areas, you must maintain the user parameters listed in the table with a value of 'X' to activate the parameters.

**The following table describes the user parameters:**

Set/Get Parameter ID	Parameter Value	Short Description
OM_OBJM_SCEN_DISPLAY	X	Displays Object Manager Scenario for Customizing
OM_FRAM_SCEN_DISPLAY	X	Displays Hierarchy Framework Scenario for Customizing
OM_ARRAYTYPE_DISPLAY	X	Displays array type information for Customizing (this is the column framework)
OM_TABTYPE_DISPLAY	X	Displays tab type information for Customizing (this is the technical tab card key)



## Customizing for the Hierarchy Framework

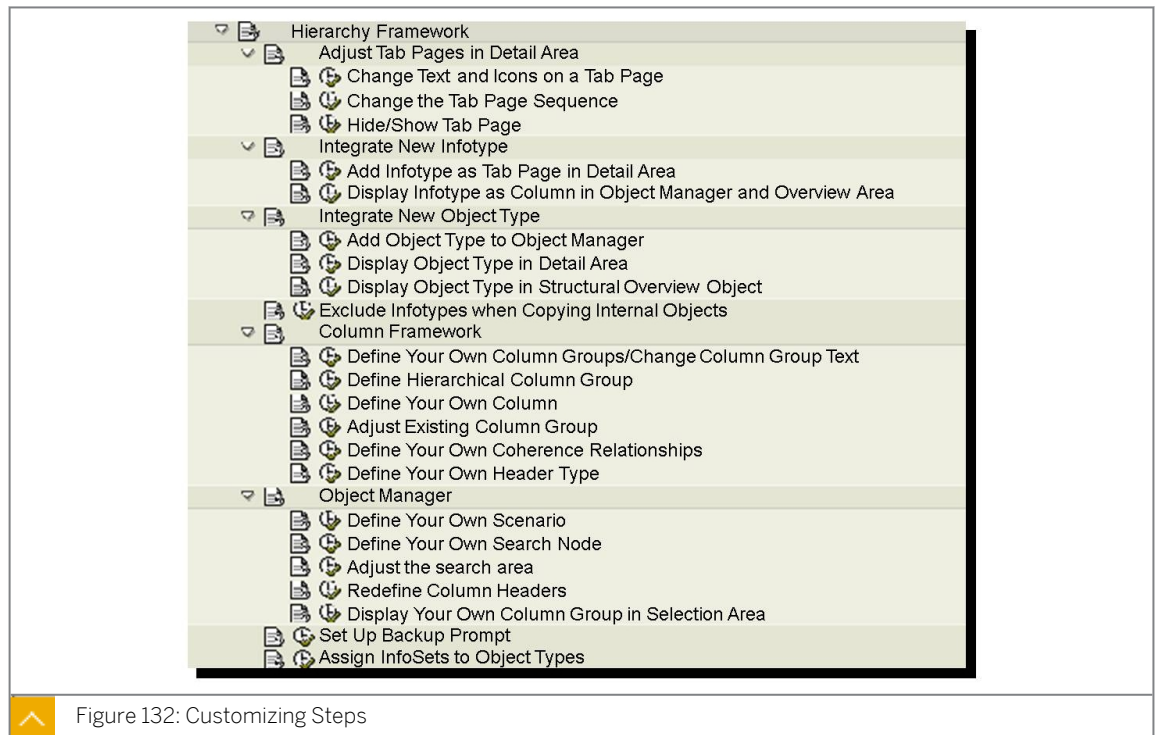


Figure 132: Customizing Steps

To make it easier to adjust the hierarchy framework in OM, SAP has added the most important table entries for maintenance to Customizing as Customizing activities.

You must perform some of the Customizing steps for your customer-specific adjustments.

### The process for adding search nodes to the object manager is as follows:

- Define your own search nodes for the object type.
- Adjust the search area.

### You can adjust the search area in the following ways:

- Add further nodes to the search area or change the sequence of the search nodes.
- Exclude search nodes.
- Adjust search nodes, and while doing so, assign search tools to your own search node.
- Exclude search tools from a search node.

The object manager offers you several configuration options.

### The configuration options include the following examples:

- Specify the object types that are available for searches.
- Define search tools.
- Specify which additional information should be displayed with the hit list in the selection area.

A specific object manager configuration is represented by an object manager scenario.





### **LESSON SUMMARY**

You should now be able to:

- Customize the object manager



## Defining Search Nodes

### LESSON OVERVIEW

This lesson shows you how to define search nodes to enable customized searches.

#### Business Example

Your company has decided that the new concept of personnel development with training groups must be represented on the Organization and Staffing interface in the hierarchy framework. As an organizational management specialist, your task is to identify and search for employees and employee groups from the available data. For this reason, you require the following knowledge:

- An understanding of how to add a customized search node to the Organization and Staffing Interface
- An understanding of the selection area



### LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Add search nodes to the structure to enable customized searches

### Search Nodes on the Organization and Staffing Interface



Search Node Key	Name	Object Ty..	Icon Name
AP	Applicant	AP	
B	Development plan		
BA	Appraisal	BU	
BG	Criteria group		
BK	Criterion		
BL	Development plan group		
BP	Business partner		
BS	Appraisal template	BU	
BV	Budget structure element		ICON_BUDGET_STRU
C		C	



Figure 133: Defining a Search Node

You can enhance the object manager by adding and adjusting a search node in the table T77FSEAN. You use table T77FSEAN to control how a search node is displayed. The search node itself is a group of search tools in the search area of the object manager. A search node can be based on an object type in table T7780 (for example, the basic object types from Organizational Management (OM)), or it can be independent of object types (for example, you can create a search node Search for Last-Used Objects with the appropriate search tools).

A search node can refer to an object type and, has a name and an icon.



The name and the icon are displayed in the search area of the object manager. If the search node refers to an object type, and if you do not enter another name or icon in the table for defining search nodes (T77FSEAN), the object manager uses the name and the icon of the object type from table T7780 when displaying the search node.



**Note:**

If the user parameter OM\_OBJM\_SCEN\_DISPLAY is set, the search area displays the object manager scenario that is active in a transaction.

## Selection Area on the Organization and Staffing Interface

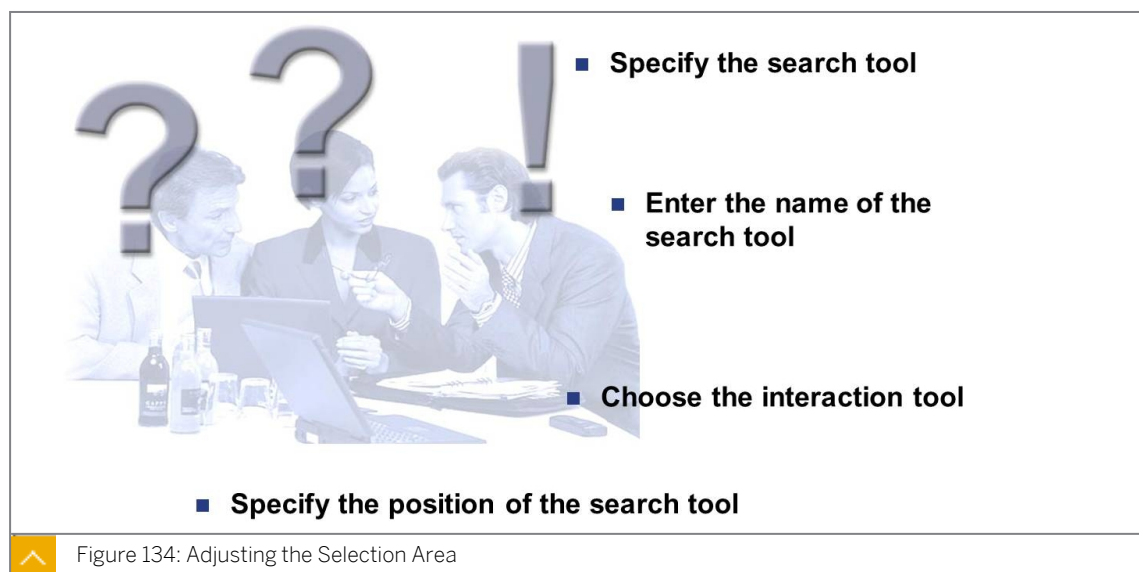


Figure 134: Adjusting the Selection Area

For the new object manager scenario you want to create, after you have defined your own search node, you must specify how the object manager displays in search node. To do this, you first have to specify the corresponding search tools.

The search tools you select determine how the system searches for a particular object.

### You are already familiar with the following search tools:

- The search for a search term (CL\_HROM\_SEARCHTOOL\_ORGP)
- The free search (CL\_HR\_ST\_ADHOC\_SELECTION)
- The structure search (CL\_HR\_OM\_SEAT\_STRUCTURAL\_SEARCH)

In the standard system, these search tools are used for various object types in the object manager on the *Organization and Staffing* interface. In Customizing, you name your search tool and specify its horizontal position, that is, its position in the sequence with the other search tools.

In this Customizing activity, you specify the type of interaction tool. In other words, you specify which actions a user can perform for the search hits displayed in the selection area, the result of these actions, or how the system responds to user actions such as double-click, right-click, and drag and drop.





**Note:**  
Search tools and interaction tools are implemented as an ABAP object class.

## Structure Search in the Object Manager

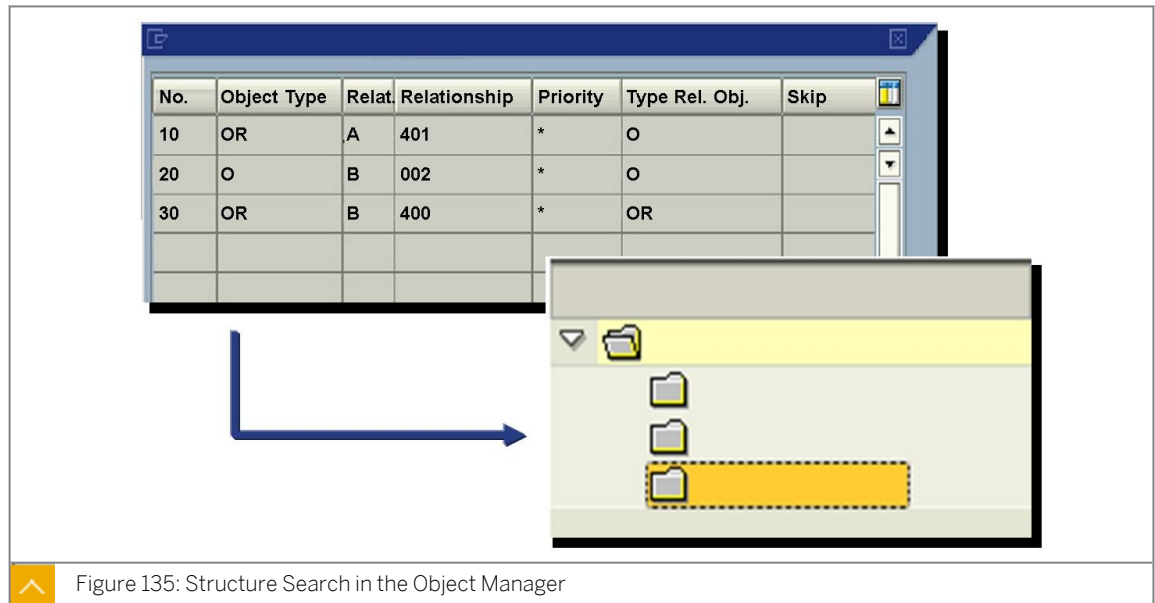


Figure 135: Structure Search in the Object Manager

For each structure search in the object manager and in the input help, you need an evaluation path. You can use an existing evaluation path or define a new evaluation path for the structure search in the object manager.

The system determines the evaluation path from table T77OS. You can store an existing evaluation path there or create a new one in advance.

For the free search, you need an InfoSet that contains the data fields and object type you require. If you want to enhance the data model by adding your own object types and relationships, you must first generate an InfoSet. You define InfoSets in transaction SQ02.

You can store the InfoSet for your free search in Customizing, by choosing *Personnel Management* → *Organizational Management* → *Hierarchy Framework* → *Assign InfoSets to Object Types*.



## LESSON SUMMARY

You should now be able to:

- Add search nodes to the structure to enable customized searches







## Outlining Column Groups

### LESSON OVERVIEW

This lesson explains how to review column groups.

#### Business Example

Your company has decided that the hierarchy framework needs to be updated with regard to organizational changes. This allows a clearer overview of the assignment of employees to departments. For this reason, you require the following knowledge:

- A understanding of the functions of column groups



### LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Outline the configuration of column groups and ensure appropriate screen views are available

### Column Groups



- **In the object manager**
  - **Dynamic column group**
  - **Column group selection**
  - **Selection of column header type**
- **In the column framework**



Figure 136: Column Groups

A column group defines the initial visibility and the initial display sequence of the columns assigned to it. In addition, you can create a coherence relationship between two or more columns in a column group to display or hide them together.

If the user parameter `OM_ARRAYTYPE_DISPLAY` is set in the user profile, you can choose *Technical Info* to determine the column group that is being displayed in a structure or list display and the columns that are assigned to it.

You can adjust the column framework to a certain extent while adjusting the object manager. There are various other options available under the *Column Framework* node in Customizing. The system displays a dialog box for column configuration in the selection area of the object manager.

For search tools that generate a column group at runtime, you must set the *Dynamic Column Group* indicator. An example of such a tool is free search. By using this tool, the user can choose any columns in the hit list.



If you want to, you must make them under the *Column Framework* node.

**The Column Framework node enables you to perform the following tasks:**

- Completely redefine column groups
- Add several columns to a column group (by creating hierarchical column groups, you can also group column groups)
- Control the visibility options for those columns

You can also make adjustments to existing columns by simply redefining them. To redefine columns, you need to maintain entries in table T77ACOLC.



### **LESSON SUMMARY**

You should now be able to:

- Outline the configuration of column groups and ensure appropriate screen views are available



## Customizing the Structural Overview

### LESSON OVERVIEW

This lesson explains how to customize the objects in the Organization and Staffing Interface by using the structural overview.

### Business Example

As an organizational management specialist, you have to represent the new personnel development concept with training groups on the *Organization and Staffing* interface in the hierarchy framework. Therefore, you need to create a structure for the organization staffing transaction. For this reason, you require the following knowledge:

- An understanding of structural overview objects



### LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Customize the overview of objects on the *Organization and Staffing* interface by using structural overview objects

### Structural Overview Objects

Structural overview objects include the design of the structural area of the *Organization and Staffing* interface. This part of the framework reflects the structure by using evaluation paths. It enables you to integrate new object types and relationships.



**The process of displaying an object type in the structural overview involves the following steps:**

- Define the service of the overview area
- Specify the properties of the service or the view
  - Specify the valid object type in each case for the selection options.
  - Specify the evaluation path with technical depth.
  - Specify the column framework for the overview area.

### Display of Object Type in Structural Overview Object: Process

**The following list provides a description of each step in the process of displaying an object type in the structural overview:**

**Define the service an overview or detail area offers:**

The service that an overview or detail object offers is defined in the table T77OBSER. For this reason, you must first define a service for the overview area in table T77OBSER and assign an attribute service to it. To do this, enter a meaningful name or key for the service



in the *Service* field of the interface object. In the *Object Key* field, enter the key of the structure overview object, GOWD (General Overview with Detail).

#### Specify the attributes of the new service:

In this view, you specify the attributes of the new service. In the *ObjectType* field, enter the new object type for which the service is to be valid.

In the *Selection* field, specify the selection type, such as single or multiple selections. In the structure overview object, you can use drag to change the displayed structure. Here, the selection type determines whether you can select one or several objects.

#### Specify the evaluation path with technical depth:

In the *Evaluation Path* field, enter the newly defined evaluation path. The system uses the evaluation path to define a structure tree, which then displays the structure overview object. To keep system response times to a minimum, the structure tree is not displayed in its fully expanded format. Instead, only the first n levels of the structure tree are visible. You define the level to which the structure tree is initially displayed, in the *Technical Depth* field.

#### Specify the column group and header type:

In the *Column Group* field, enter a column group. NF\_GEN\_OV is a column group framework delivered by SAP that you can use generically. In *Header* field, you can enter a header type that redefines the column headers of the column group. This is optional.

### Requests

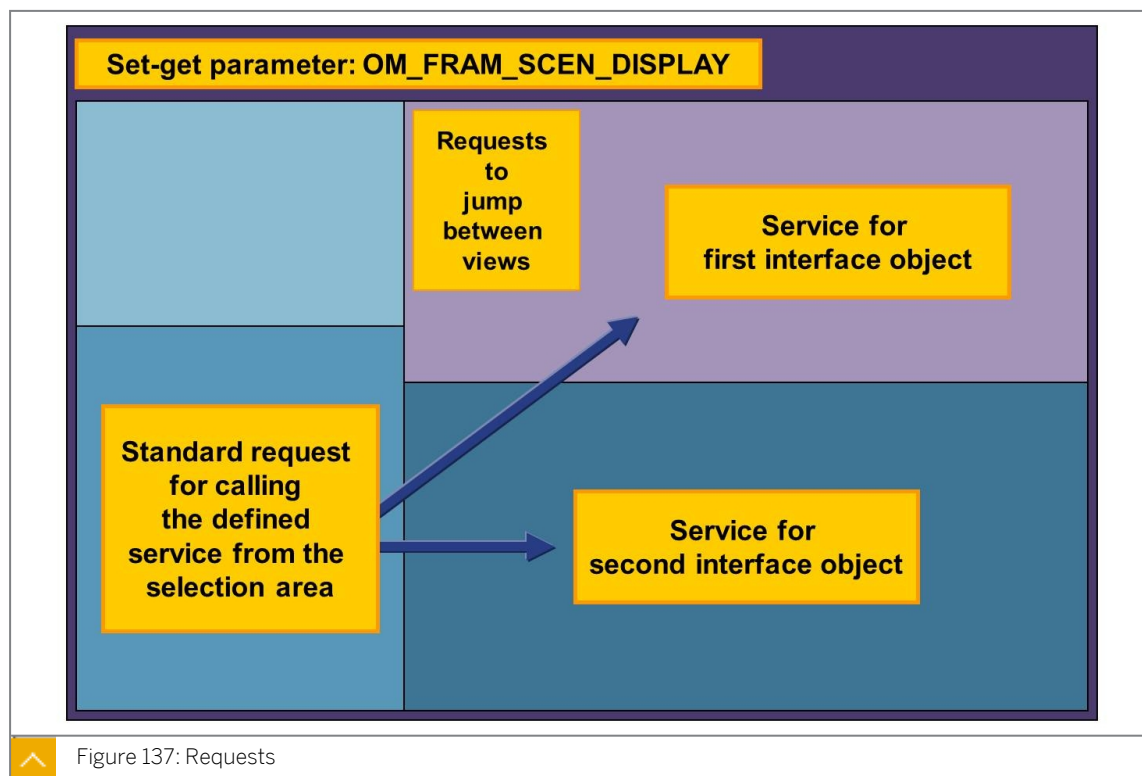


Figure 137: Requests

The services of an overview or detail object are not called directly. They are available indirectly to all interface objects through requests. These requests control which overview and detail objects are displayed in a hierarchy framework scenario at a particular time. You must therefore set up the request.



To identify the scenario used in the framework, you can use the SET/GET parameter OM\_FRAM\_SCEN\_DISPLAY to display the scenario name in the title bar.

## Tab Page Adjustment

### Adjust Tab Pages



- You can adjust the detail area of the hierarchy framework for your organization

**You can adjust the detail area of the hierarchy framework for your organization in the following manner:**



- Add customer infotypes to the detail area in the form of tab pages.
- Hide displayed infotypes or show infotypes that were previously excluded.
- Change the order in which the infotypes are displayed as tab pages.

You can display simple customer infotypes on a tab page in the detail area.



**Note:**

It is recommended that you display simple customer infotypes on an infotype-specific tab page (only one infotype).

For the display, the system uses the subscreen generated for the infotype in transaction PPCI (screen number 7000).

### To display a customer infotype on a tab page in a detail area includes the following steps:

1. Enter the infotype number in the entry field and choose the *Create* pushbutton.
2. On the next screen, choose *Create Subscreen* from the Infotype menu. This generates subscreen 7000. Because this is an SAP program, a system message appears. In this case, you can ignore the message.
3. In table *T77ID*, under Subscreen, enter **subscreen 7000** for the infotype.
4. You can add the infotype as a tab page in the detail area. To do this, in Customizing, choose *Personnel Management* → *Organizational Management* → *Hierarchy Framework* → *Integrate New Infotype*.

You can define your own tab page (or table *T77OMTABS*; for example IT1000 -> IT1503). Add your own tab page to an existing tab page group (table *T77OMTABUS*). In other words, you assign the new tab page to an object type and a scenario.

You can integrate simple infotypes in the detail object display.



**Note:**

There are 2 SAP notes, 1833102 and 1860681, which describe the process to integrate a complex infotype such as 1005 into PPOME.





### LESSON SUMMARY

You should now be able to:

- Customize the overview of objects on the *Organization and Staffing* interface by using structural overview objects



## Learning Assessment

1. The object manager consists of a search area and a selection area.

*Determine whether this statement is true or false.*

☐ True

☐ False

2. The object manager helps you to search for specific \_\_\_\_\_.

*Choose the correct answer.*

☐ A nodes

☐ B objects

☐ C screens

3. The work area consists of \_\_\_\_\_ and \_\_\_\_\_.

*Choose the correct answers.*

☐ A overview area

☐ B object area

☐ C switch area

☐ D detail area

4. The SAP hierarchy framework helps you to customize applications for visualizing and modifying hierarchical structures and objects.

*Determine whether this statement is true or false.*

☐ True

☐ False



5. You use table T77FSEAN to control how a search node is displayed.

*Determine whether this statement is true or false.*

☐ True

☐ False

6. To specify how the object manager displays a search node, you need to first specify the corresponding search tools.

*Determine whether this statement is true or false.*

☐ True

☐ False

7. The search tools you select determine how the system searches for a particular object.

*Determine whether this statement is true or false.*

☐ True

☐ False

8. A column group defines the initial visibility and the initial display sequence of the columns assigned to it.

*Determine whether this statement is true or false.*

☐ True

☐ False

9. Which of the following tasks can be performed using the Column Framework node?

*Choose the correct answers.*

☐ **A** Redefine column groups

☐ **B** Add a single column to a column group

☐ **C** Group column groups

☐ **D** Control the visibility options for columns

10. For search tools that generate a column group at runtime, you must set the Dynamic Column Group indicator.

*Determine whether this statement is true or false.*

☐ True

☐ False



11. While displaying an object type in the structural overview, you specify the selection type in the Evaluation Path field.

*Determine whether this statement is true or false.*

☐ True

☐ False

12. The services of an overview or detail object are only available indirectly to all interface objects through requests.

*Determine whether this statement is true or false.*

☐ True

☐ False

13. While defining a new request to set up the request control, what do you enter in the Hierarchy Framework Request field?

*Choose the correct answers.*

☐ A Technical key

☐ B Name

☐ C Infotype number

☐ D Tab page

14. In the process of displaying an object type in the structural overview, you enter the new object type for the valid service in the Object Key field.

*Determine whether this statement is true or false.*

☐ True

☐ False



### Learning Assessment - Answers

1. The object manager consists of a search area and a selection area.

*Determine whether this statement is true or false.*

☒ True

☐ False

2. The object manager helps you to search for specific \_\_\_\_\_.

*Choose the correct answer.*

☐ A nodes

☒ B objects

☐ C screens

3. The work area consists of \_\_\_\_\_ and \_\_\_\_\_.

*Choose the correct answers.*

☒ A overview area

☐ B object area

☐ C switch area

☒ D detail area

4. The SAP hierarchy framework helps you to customize applications for visualizing and modifying hierarchical structures and objects.

*Determine whether this statement is true or false.*

☒ True

☐ False



5. You use table T77FSEAN to control how a search node is displayed.

*Determine whether this statement is true or false.*

☒ True

☐ False

6. To specify how the object manager displays a search node, you need to first specify the corresponding search tools.

*Determine whether this statement is true or false.*

☒ True

☐ False

7. The search tools you select determine how the system searches for a particular object.

*Determine whether this statement is true or false.*

☒ True

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8. A column group defines the initial visibility and the initial display sequence of the columns assigned to it.

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9. Which of the following tasks can be performed using the Column Framework node?

*Choose the correct answers.*

☒ A Redefine column groups

☐ B Add a single column to a column group

☒ C Group column groups

☒ D Control the visibility options for columns



10. For search tools that generate a column group at runtime, you must set the Dynamic Column Group indicator.

*Determine whether this statement is true or false.*

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☐ False

11. While displaying an object type in the structural overview, you specify the selection type in the Evaluation Path field.

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*Determine whether this statement is true or false.*

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☐ False

13. While defining a new request to set up the request control, what do you enter in the Hierarchy Framework Request field?

*Choose the correct answers.*

☒ A Technical key

☒ B Name

☐ C Infotype number

☐ D Tab page

14. In the process of displaying an object type in the structural overview, you enter the new object type for the valid service in the Object Key field.

*Determine whether this statement is true or false.*

☐ True

☒ False



# UNIT 11

# Evaluations and Reports in Organizational Management

## Lesson 1

Describing Structural Reports

215

## Lesson 2

Executing Standard Delivered Reports

219

### UNIT OBJECTIVES

- Describe the structural reporting functionality
- Execute standard delivered reports







## Describing Structural Reports

### LESSON OVERVIEW

This lesson explains how to work with structural reports and structure conditions.

#### Business Example

Your company wants to use an organizational plan for structural reports. As the personnel administrator of the company, you need to maintain data, such as employee lists for each organizational unit, cost center assignments for positions, and job descriptions with task and qualification assignments, in a logical sequence. For this reason, you require the following knowledge:

- An understanding of structural reports
- An understanding of parameters to call structural reports
- An understanding of structure conditions



### LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Describe the structural reporting functionality

### Structural Reporting

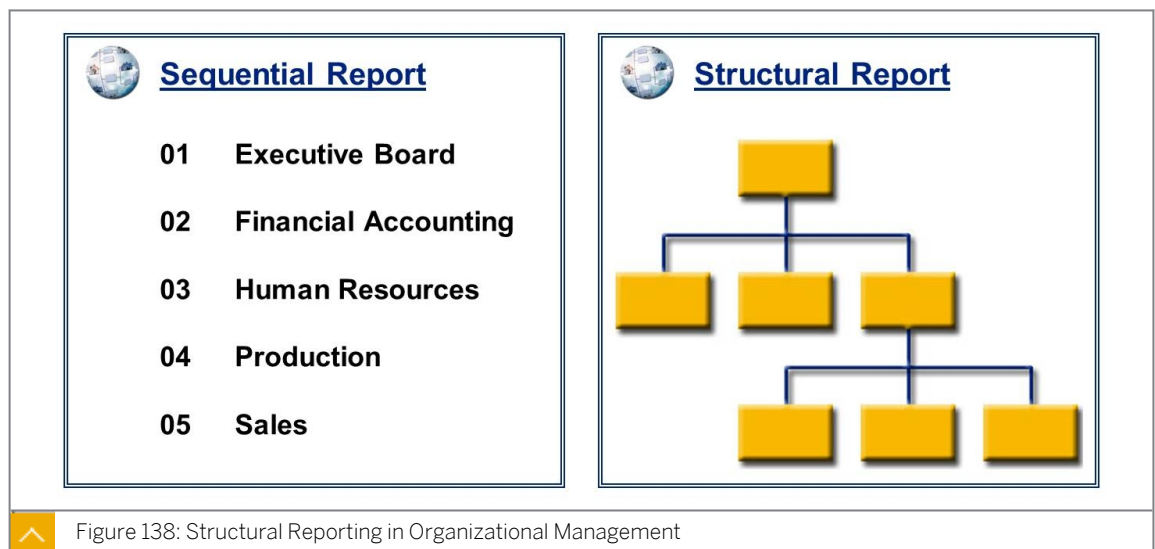


Figure 138: Structural Reporting in Organizational Management

The following distinction is made between sequential and structural reporting:

Sequential:



In sequential reporting, you can list the objects to be evaluated by using their IDs. A sequential evaluation then takes place for all of the objects you have specified. For example, you can display a list of all existing jobs.

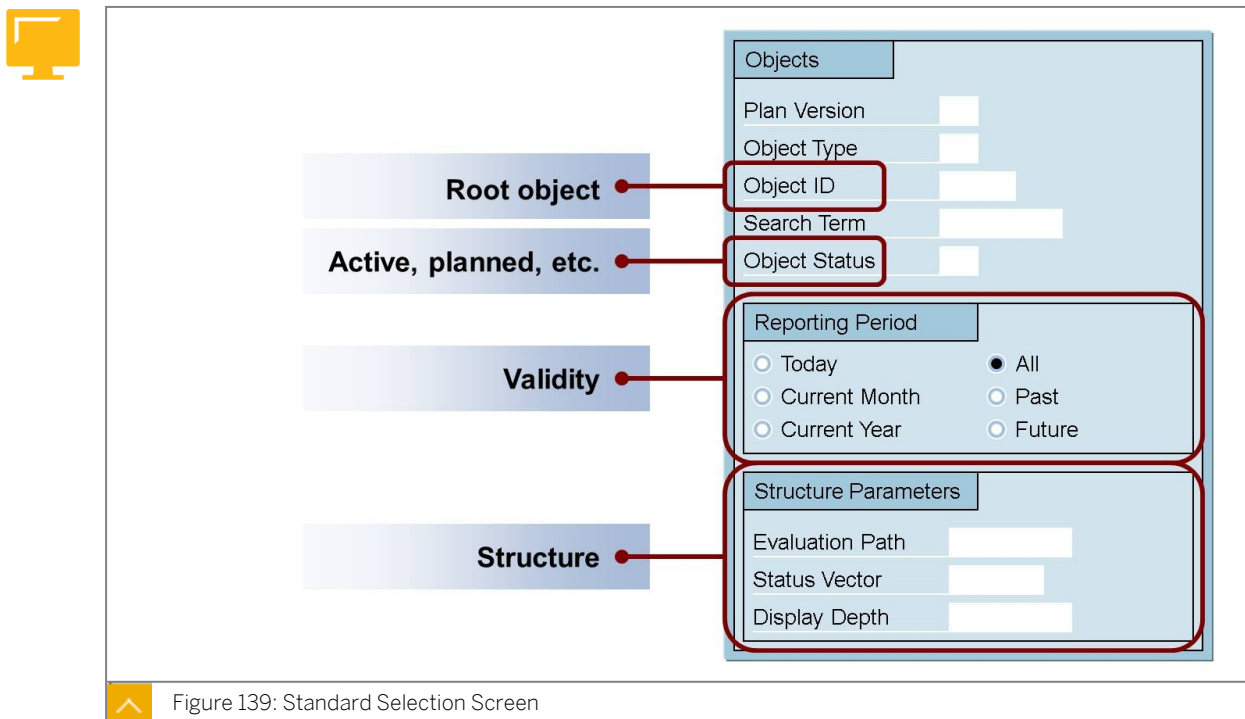
### Structural:

In structural reporting, the system interprets the selected object as a root object. Based on this root object and the relationships, the system constructs a hierarchical structure.

### Sequential and Structural:

In sequential and structural reporting, the system treats each selected object as the root object for an evaluation path.

## Standard Selection Screen



The diagram illustrates the Standard Selection Screen with the following components:

- Root object**: Points to the **Object ID** field in the **Objects** section.
- Active, planned, etc.**: Points to the **Object Status** field in the **Objects** section.
- Validity**: Points to the **Reporting Period** section, which includes radio buttons for **Today**, **Current Month**, **Current Year**, **All** (selected), **Past**, and **Future**.
- Structure**: Points to the **Structure Parameters** section, which includes input fields for **Evaluation Path**, **Status Vector**, and **Display Depth**.

The **Objects** section also includes fields for **Plan Version**, **Object Type**, and **Search Term**.

Figure 139: Standard Selection Screen

The logical database PCH used for reporting in Organizational Management (OM) contains a *Standard Selection* screen. The *Standard Selection* screen allows you to access additional report parameters that you may wish to use in developing your report request.



## Structure Parameters and Technical Depth



Figure 140: Structure Parameters and Technical Depth

**The Structure Display / Maintenance screen includes the following structure parameters:**

**Evaluation Path:**

This parameter allows you to confine a query or a report to a specified evaluation path.

**Status Vector:**

This parameter determines which selected objects are read according to the status of their relationships.

**Display Depth:**

This parameter is a number that specifies the number of levels of the organizational structure that are to be shown.

**Technical Depth:**

This parameter is a number that specifies the number of the organizational structures that are to be processed.

**Recursion Check:**

This parameter indicates whether the system needs to check the relationship between objects for recursion.

**Status Overlap:**

This parameter is used with the *Status Vector* field to start a simulation run to demonstrate the effects of activating infotypes.

The *Technical Depth* and the *Display Depth* fields contain a number that can be up to 6 digits in length. This number corresponds to the different levels of an organizational structure. If you do not wish to limit the display or processing, you can leave these fields blank.

A recursion occurs when the system traces many relationships among objects in a structure and finds no termination point. The system is therefore in an endless loop.

The change in status that you simulate by using status overlap is only temporary and does not affect the structure.



## Structure Conditions

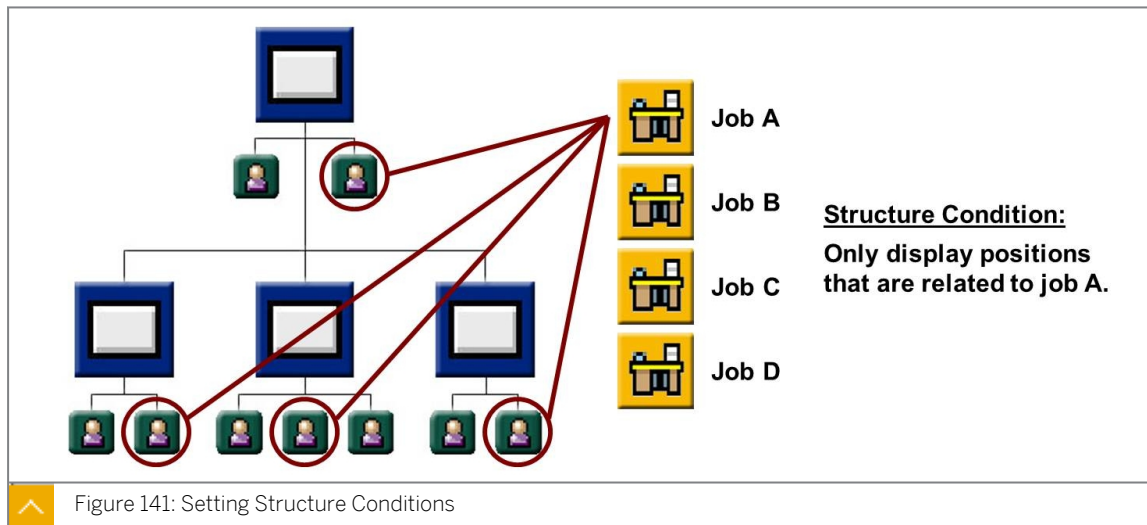


Figure 141: Setting Structure Conditions

You can set various structure conditions that objects must meet if they are to be displayed in the structure.

You can create more than one structure condition.

In the *Structure Conditions* dialog box, you can specify the conditions that objects must fulfill if they are to be displayed in the structure. You can define several conditions and their use for reporting.

You can also specify when the system stops checking the objects in a structure, that is, whether it checks all the objects (object filter) or whether it stops as soon as it encounters an object that does not meet the set conditions (branch filter).



## LESSON SUMMARY

You should now be able to:

- Describe the structural reporting functionality



## Executing Standard Delivered Reports

### LESSON OVERVIEW

This lesson explains how to find and execute standard reports.

### Business Example

Your company wants to utilize the standard reporting functionality. As a personnel manager, you need to organize employee data in a logical and well-structured format. For this reason, you require the following knowledge:

- An understanding of standard reports and their results



### LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Execute standard delivered reports

### Standard Reports

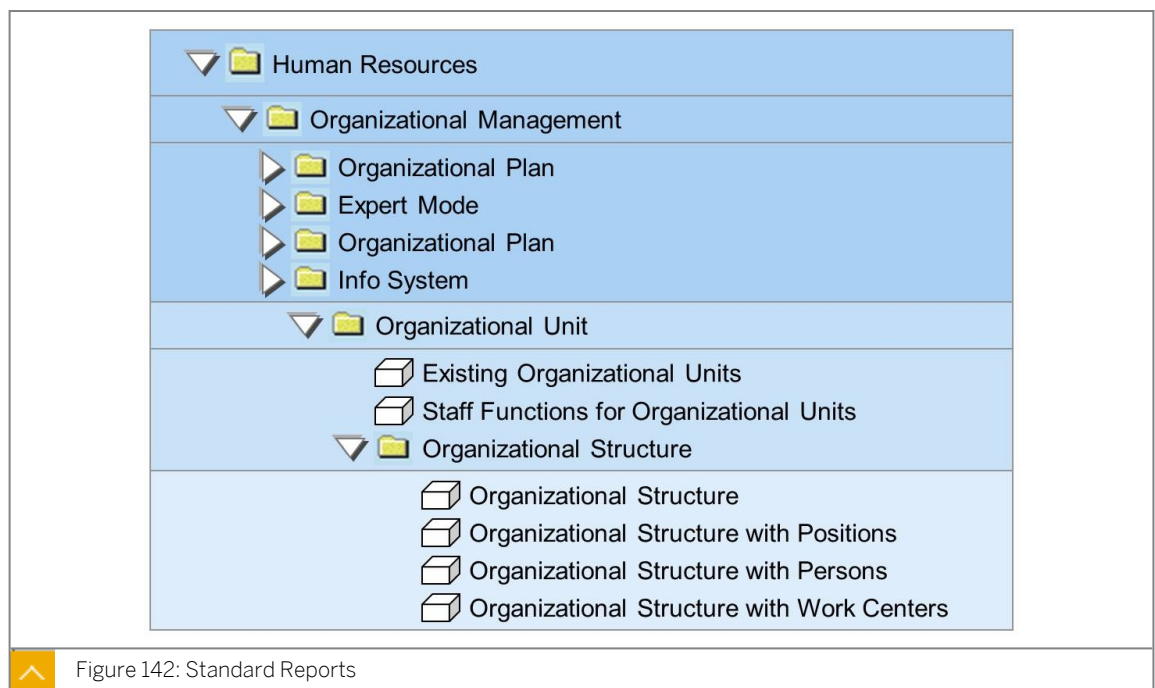


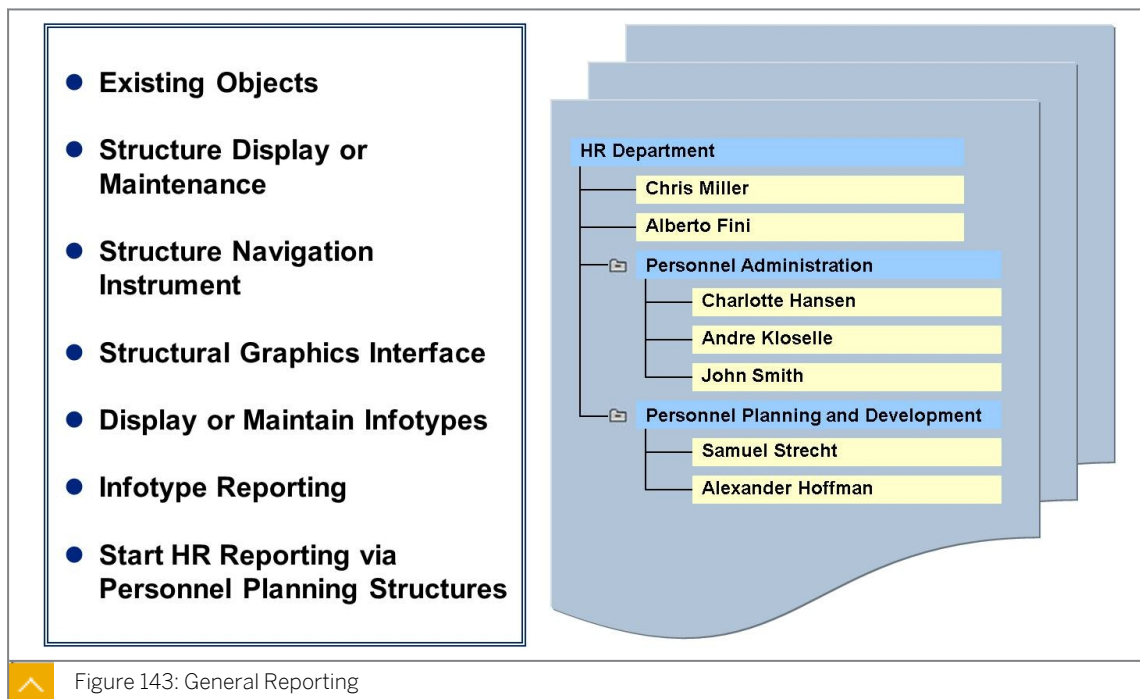
Figure 142: Standard Reports

Many standard reports are available in the *Organizational Management* menu. These reports can be executed from shortened selection screens, or in some cases, the user can choose to go to the standard selection screen.

Almost all the structural reports contain report RHSTRU00 or a variant of it.



## General Reporting



You can access reports that are not based on a specific object type in the menu by choosing *Reporting* → *General*.

**The different types of general reports in Organizational Management (OM) are as follows:**

### Existing Objects:

Provides an overview of all selected objects and presents them in an ABAP List Viewer

### Structure Display or Maintenance:

Displays a section of the organizational plan according to the initial object and evaluation path entered

### Structure Navigation Instrument:

Lists all existing objects according to type and ID

After you have selected an object, you can go to Infotype Maintenance.

### Structural Graphics Interface:

Enables you to depict your structure graphically

### Display or Maintain Infotypes:

Displays overview of all existing infotypes and their statuses for one or more objects within a plan version

### Infotype Reporting:

Is used to evaluate infotypes

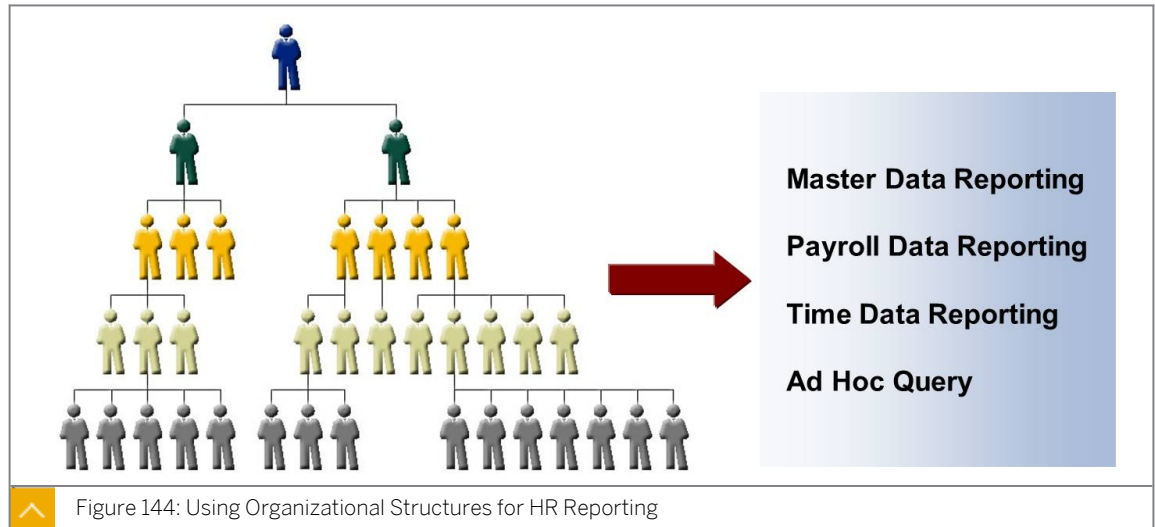
It can be executed structurally or sequentially. The report can also be used for infotypes that you have created yourself

### Start HR Reporting via Personnel Planning Structures:

Can be executed through the structures so that the objects are selected along with the structures



## HR Reporting Structure

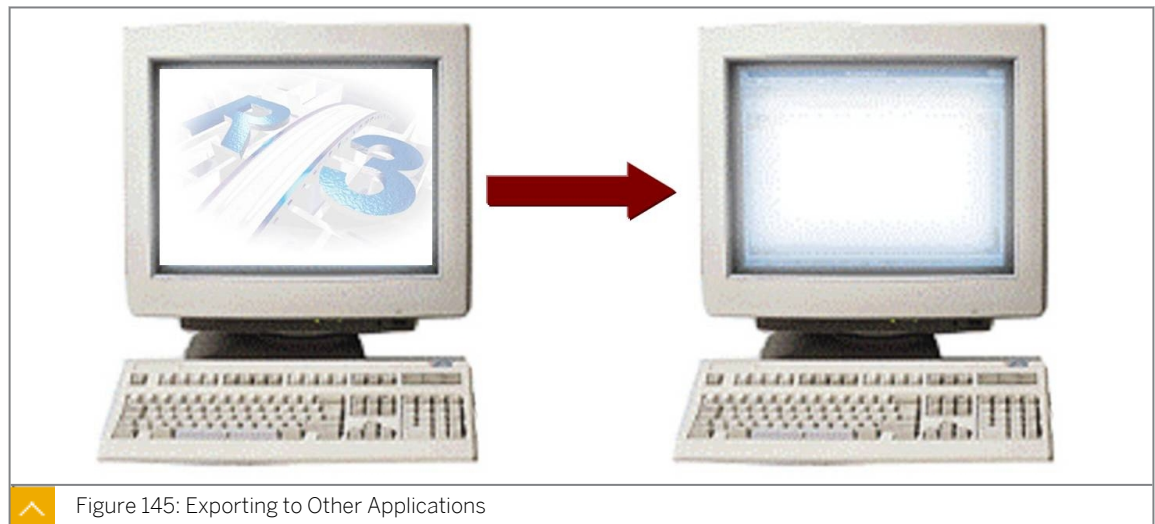


HR reporting allows you to start different HR reports for various different personnel numbers. The reports draw on information from the structures in the organizational plan.

This program scans the OM database and gathers personnel numbers, if objects of type P are contained in the selected structure. The output sequence depends on the selection options you specify. The master data reporting variant specified under PA Reporting, such as RPLIC010, is then started for these personnel numbers.

You can start reports for HR master data for a set of personnel numbers, sorted in the order defined by an organizational structure.

## Exporting of Organizational Management Data



Data from the organizational plan can be exported to other software applications, for example, for the production of organizational charts. A standard interface exists for this purpose. However, the interface is designed for exporting data only. You cannot use this interface to import data into OM.





### **LESSON SUMMARY**

You should now be able to:

- Execute standard delivered reports



## Learning Assessment

1. Which screen allows you to access additional parameters to be used in developing the report request?

*Choose the correct answer.*

- ☐ A Shortened Selection screen
- ☐ B Standard Selection screen
- ☐ C Simple Maintenance screen
- ☐ D Manager's Desktop screen

2. What is the maximum length of the number in the Technical Depth and the Display Depth fields that corresponds to different levels of an organizational structure?

*Choose the correct answer.*

- ☐ A Up to 4 digits
- ☐ B Up to 6 digits
- ☐ C Up to 5 digits
- ☐ D Up to 8 digits

3. The standard selection screen allows you to access additional report parameters that you can use in developing your report request.

*Determine whether this statement is true or false.*

- ☐ True
- ☐ False

4. Standard reports are available for Organizational Management.

*Determine whether this statement is true or false.*

- ☐ True
- ☐ False



5. Data from the organizational plan can be exported to other software applications.

*Determine whether this statement is true or false.*

☐ True

☐ False



## Learning Assessment - Answers

1. Which screen allows you to access additional parameters to be used in developing the report request?

*Choose the correct answer.*

- ☐ A Shortened Selection screen
- ☒ B Standard Selection screen
- ☐ C Simple Maintenance screen
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5. Data from the organizational plan can be exported to other software applications.

*Determine whether this statement is true or false.*

☒ True

☐ False



# UNIT 12

## Case Study Organizational Structure Setup

### Lesson 1

Setting Up an Organizational Structure

229

#### UNIT OBJECTIVES

- Set up and verify an organizational structure configuration







## Setting Up an Organizational Structure

### LESSON OVERVIEW

The purpose of this lesson is to test your knowledge of the content of this course.

### Business Example

Your company has four sales regions. This year you will be rolling out the next best thing in bicycles. For the rollout, the company has purchased a large mobile demonstration vehicle which will travel the country for sales demonstrations. This vehicle will be shared between the regions and you want to create a structure of the sales regions as well as create a new object type to reflect the demonstration vehicle and track its assignment to regions.

Your task is to set up the structures to meet the new requirements.



### LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Set up and verify an organizational structure configuration



### LESSON SUMMARY

You should now be able to:

- Set up and verify an organizational structure configuration